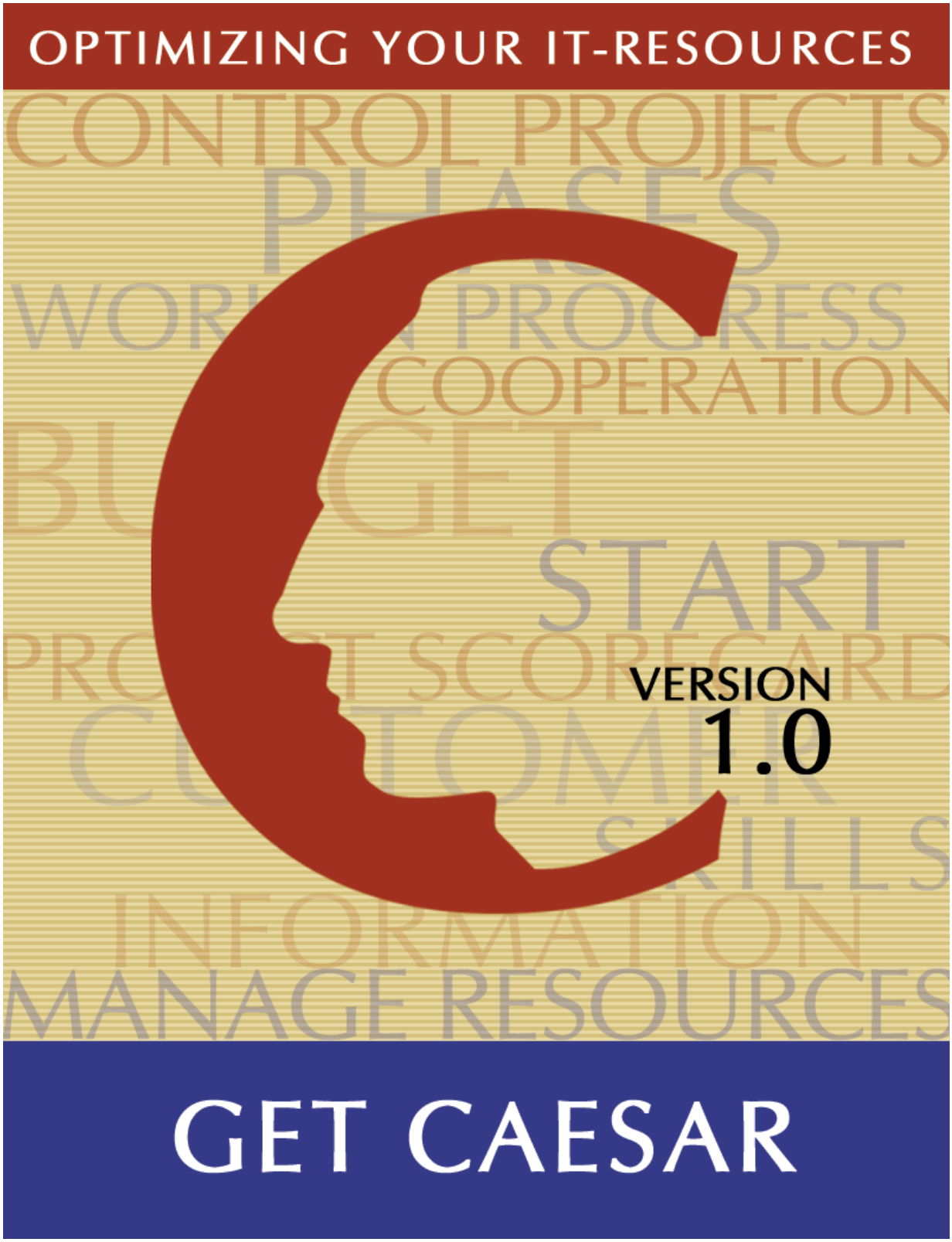


# USER MANUAL

VERSION: 1.0, DATE: AUGUST 12, 2002

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## SUPPLIER

GET Information Technology GmbH
Rudolf-Diesel-Strasse 14
41516 Grevenbroich, Germany

Tel: 02181 / 47 57 780
Fax: 02181 / 47 57 782

E-mail: info@myget-it.com
Internet: www.myget-it.com

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# 1 INTRODUCTION

The purpose of this document is to provide a brief overview of the essential features of the "GET Caesar". This system is targeted to solve the central challenge of project-based IT-departments: transparency of resource utilization and efficient decision support. To achieve this goal the system supports management and control of the set of core business processes.

- **Order** management that controls all activities in the project initiation phase like planning of resources, budgets, project phases and contract-related information.
- **Project** management that controls all activities for running projects like resource and budget utilization and project progress
- **Skills** management that is a part of personnel information management and which provides a central repository for the skills and experience of the employees in the organization
- **Resources** management that is a part of project management, which provides decision support to request and assign human resources in a multi-project environment
- **Costs** management that is also a part of project management, which provides decision support to plan and control the costs allocated to the projects

Aiming at extreme simplicity and instant benefit for the project related departments in the organization the system offers a role based workflow that poses few prerequisites to the established business process in the organization. The architecture of the system provides means to easily customize or extend functionality to allow rapid integration into the IT infrastructure of the organization.

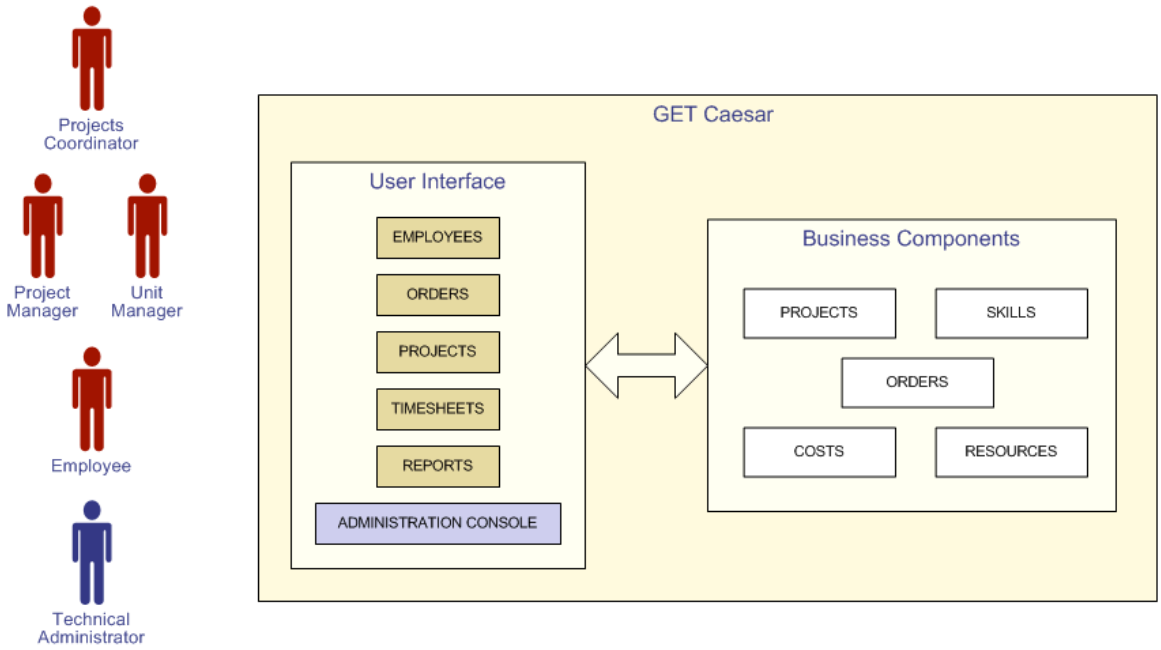


**Figure 1-1. GET Caesar: User Roles, User Interface, Business Components**

Per default the system supports the following user roles and typical use cases:

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| Type of user | Typical Use Case |
|---|---|
| Project Manager | • Order/project initiation<br>• Skill oriented project staffing<br>• Control and report project progress |
| Unit Manager | • Assignment of team members according to project skill requirements and inter-project dependencies<br>• Confirmation of employee's services to projects (timesheets)<br>• Plan and control the workload within the organizational unit |
| Projects Coordinator | • Approve order / release project<br>• Monitor project indicators<br>• Provide overview of all project related services within the organization |
| Employee | • Maintain skill profile<br>• Submit working progress on weekly basis (timesheets) |
| Technical Administrator | • Configure roles and system security<br>• Maintain system reference data (directories, etc.) |

## 1.1 USING THIS GUIDE

The guide is in five parts:

1. **Part I** is the introduction.
2. **Part II** gives you overview of the main concepts behind the system: Orders, Projects, Employees, Timesheets, Reports and Security
3. **Part III** explains main business processes supported by the system including Order management, Resources assignment, Project tracking, etc.
4. **Part IV** is a system reference describing user interface screens, menus and buttons.
5. **Appendix** contains glossary section describing main terms that were used in this document.

## 1.2 WHO SHOULD READ THIS GUIDE

This guide is intended for all supported user profiles of the Get Caesar Resource Management System:

- Project managers;
- Unit managers;
- Project coordinators;
- Employees;
- Technical administrators.

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# 2 MAIN CONCEPTS

This chapter presents main concepts of the GET Caesar, gives their description, states diagram (if possible) and dependency on other parts of the system.

## 2.1 ORDER

On of the key concepts of the system is an **order**. Order is a contract between customer and project manager about certain activity performed by project manager and his team.

If order is **not approved**, the corresponding project can not be started. It means that no resources, money or time can be spent unless the order is approved by approving authority.

All information that is stated in the order is a plan for the future activity, whereas project information is a real state of affairs in the project. Information in project is often not the same as in order (the same way as plan is not always the same as reality).

Order has a set of attributes (like name, type, etc.), planned resources and planned budget. Let's look at each of these important parts of the order.

### 2.1.1 ORDER ATTRIBUTES

In GET Caesar order has the following attributes:

| Attribute name | Attribute description |
|---|---|
| Order name | The name of the order. This name will be also used as a name of corresponding project.<br>For example: "Corporate Intranet system" |
| Order type | There is a predefined list of order types. Each order type has a name and a set of phases attached to it. Both order type list and phase list can be configured in administration console.<br>For example: order type can be "Software development" with phases Planning, Requirements, Design, Implementation, Testing. Another order type can be "Issue of a newspaper" with phases Articles compilation, Newspaper designs, Publishing. |
| Status | Order status is a characteristic of present order state. Order status is set automatically by the system depending on the order state. Please look at the order status diagram below in this chapter. |
| Approving person | The name of the approving person. Approving person is a person that can approve or decline an order. This is one member of the organization who is empowered to take general decisions on budgets, resources and deadlines. |
| Project manager | Project manager name. Project manager is a person that is responsible for performing the order. |
| Customer | Company name. There is a predefined list of customers. This list can be edited in the administration console. Customer information includes such parameters as company name, address, contact person, etc. |
| Start and finish dates | Planned start and finish dates of the project. |

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| | |
|---|---|
| Customer representative | Refers to the name of the contact person at the customer's side. |
| Project sponsor | Refers to the name of the person at the customer's side who is in charge of the budget for the order / project. |
| Description | Short description of the project |
| Constraints | Constraints can include various dependencies of this project on other projects, or some external conditions for this project. |

### 2.1.2 ORDER RESOURCES

**Order resources** are people who perform certain activities in frame of the order. In GET Caesar resources can be assigned only to phases of the order. Order phases are defined by order type (see order attributes table above). Each order phase has its start and finish dates.

Project manager can ask unit manager to give him resources for the planned project (in other words, order) and specify requirements that these resources have to satisfy. Unit manager can choose people from his or her unit that match the project manager requirements and assign the matching people to the order (see description of the process "Resources Assignment" in chapter 4).

There are several characteristics that describe assignment of a person to a phase:

- **Occupancy period**. A person can be assigned to the whole phase, and to a part of it. It means that there is a period of time for which the person is occupied in the phase.
- **Occupancy value**. During the period of occupancy, the person can be required to work not the whole day, but some part of the day
- **Position**, in which this person works in the project phase during the specified occupancy period. In the company each employee has a position that is stated in his personal profile. A person can be assigned to a phase in a position that is different from his own position. The cost is always calculated based on employee's own position, not position in phase.

**For example**: Phase "Implementation" has start date 01.07.2002 and finish date 30.07.2002. A person can be assigned to this phase from 01.07.2002 to 15.07.2002 (occupancy period) in position Software Engineer with occupancy value 50% (in the employee's personal profile his or her position can be Software Programmer. Cost of the employee in the project is calculated based on Software Programmer's man-day cost, not Software Engineer's one).

Once a person is assigned to an order for some occupancy period and occupancy value, it should not be assigned to another project for the same period so that his occupancy value is more than 100% (if it is still assigned in this way, the occupancy reports will show this problem).

### 2.1.3 ORDER BUDGET

**Order budget** is a sum of resources cost and other costs.

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**Resources costs** are calculated automatically based on the assigned resources (the cost of an employee in the project is calculated based on his own position, not position in project, see section "Order resources" above). Resources costs are divided into **internal resources** and **external resources** costs.

The system automatically computes the costs for resources via the following procedure:

1. For each position in the organization the costs per man-day (currency : €) are maintained by the technical administrator in the administration console ("Positions" system directory)

2. After resources assignment the system looks up the position for each assigned resource in the personal profile and retrieves the position specific man-day cost. The "number of assigned working days per resource" is calculated via multiplication of "occupancy" times "duration". The "costs per assigned resource" are calculated via multiplication of "number of assigned working days per resource" times "position man-day costs".

3. The system performs step 2 for each assigned resource and stores the summation result as resource costs for each phase.

4. The system performs step 3 for each phase and stores the summation result as resource costs for the order.

**Other costs** have the following structure: There is a system directory of cost types that can be edited in the administration console. Each cost type can contain any number of cost items (entered manually by the person who fills in the order)

When a cost needs to be added to the order, first cost type should be selected. Then, arbitrary cost name and the corresponding cost value should be entered to the system.

**For example**: The directory of the cost types includes types "Investment costs", "External costs" and "Other costs". If a project manager would like to add to an order the cost for buying software license, he or she can choose type "Investment cost", type the name of the cost "Software license" and put the cost value (the software license price).

Usually all costs are assigned to a **cost center**. Cost center is an accounting unit that pays out all costs connected with this order/project. There can be several cost centers in a company (for example, if a company is international, then different cost centers can be defined for different countries) There is a predefined list of cost centers.

### 2.1.4 ORDER STATUS

There are 5 order statuses:

| Status | Description |
|---|---|
| NEW | When an order is created, its status is "New". New orders can be changed until their status becomes "Current" |
| WAITING FOR RESOURCES ASSIGNMENT | An order receives this status when resources are requested for the order. In this state only the resources assignment can be |

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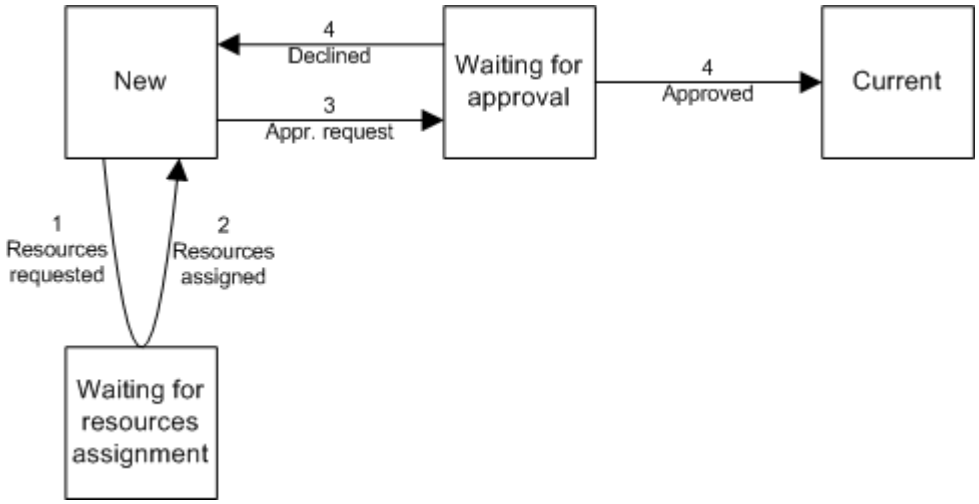
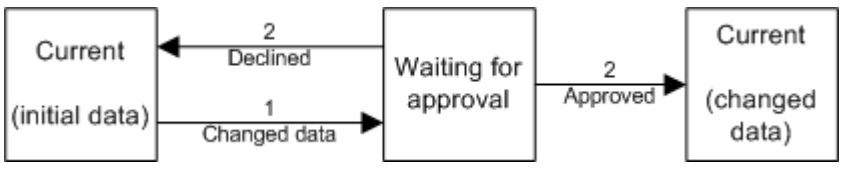
| | |
|---|---|
| | performed. When resources are assigned, order's status changes back to "New". |
| WAITING FOR APPROVAL | An order receives this status when order creation or current order change is to be approved. After approval the order's status changes to "Current" |
| CURRENT | Running (approved) orders have status "Current". Current orders can not be changed directly, only via project change (see procedure "Project tracking"). |
| CLOSED | Current order can be closed by a person that has appropriate permissions. In this case order status is changed to "Closed". Closed orders are not changeable and serve for statistical purposes. |

There are 3 main transitions:

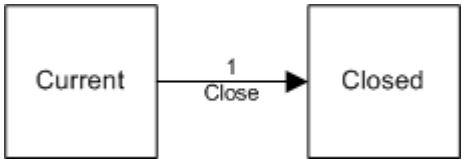
1. Transition from new to current order (corresponds to the order creation procedure)




2. Transition from current order to current order (with change of order information).




3. Transition from current order to closed order (corresponds to order closure procedure)

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## 2.2 PROJECT

In the GET Caesar, **project** notion refers to activity of performing the corresponding order. Order keeps planned activity, whereas project keeps actual information about the activity.

The **project is created** automatically when the corresponding order is approved.

When a project is created, it is initialized by information from the order. It means that in the beginning project has the same attributes as order.

In real life when project is running, its **actual data** differs from **planned data**. But often these differences are not so crucial and it is still possible to fulfill order requirements. On the other hand, some of the differences *are* crucial and require order change (for instance budget and final deadline). In order to support this kind of dilemma, order and project concepts are introduced here.

**Project manager** can **track** the real flow of the project in the project section. It is possible to **change resources**, **dates** and **budget** according to the real project situation. It is possible to **view reports** on actual situation in projects and real resources distribution in all running projects. Of course project managers **must submit** real data into the system so that these reports reflect current situation.

But if changes in project are so crucial that they contradict seriously with the order, the system will force project manager **to inform approving authority** about the project situation. See the next section about some details about the process of project change.

### 2.2.1 PROJECT CHANGES

After the project is started, project manager can (and usually has to) update project information with real data. **The update of project information does not influence order information if the following conditions are met:**

- Project start date can not be moved to date that is earlier then order start date;
- Project finish date can not be moved to date that is later then order finish date;
- Project budget can not exceed order budget.

A violation of one of these conditions will force update of order information and trigger afterwards the corresponding order approval procedure.

The picture below illustrates the process of order change.

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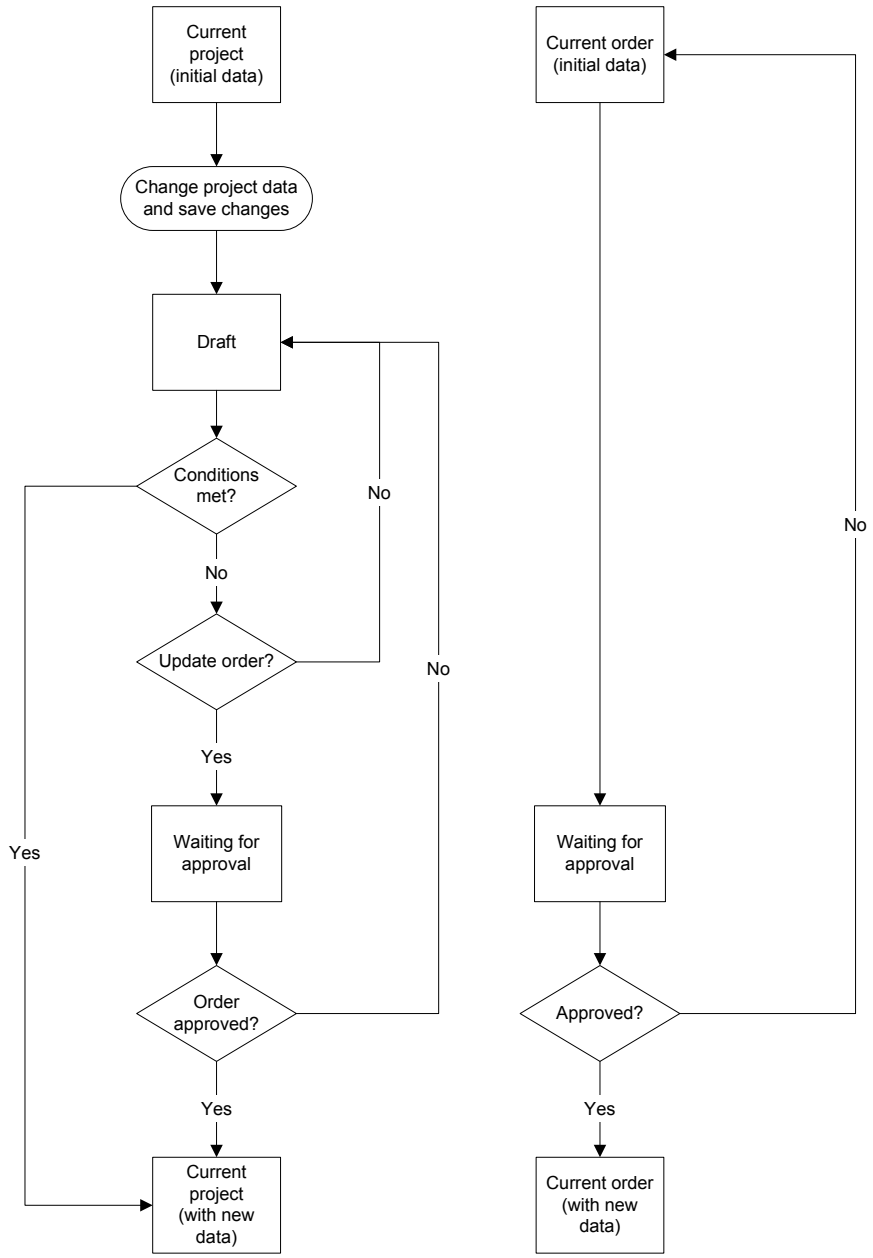


If project manager makes changes that violate one or more of the above conditions, the project status is changed to **"Draft"** and the project manager is offered to change order and update order information with the project data.

If project manager agrees to change the order, the new version of order is created. This new version of order has status **"Waiting for approval"**. At the same time, project also gets the status "Waiting for approval". Approving person can now approve or decline order change (not project).

If order change is approved, both the order and the project get status **"Current"**. Now, both order and project has the same updated information.

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If the order change is declined, order is rolled back to “Current” status with the data that it had before the approval request. Project returns to draft state. Project manager can roll back all changes, or make changes that meet the conditions.

### 2.2.2 PROJECT STATUS

A project in GET Caesar has 5 statuses:

| Status | Description |
|---|---|
| CURRENT | Running projects have status “Current”. All current projects have corresponding “Current” order. If current project is changed, its status changes to “Draft” (see procedure “Project tracking”). |
| DRAFT | Draft projects are the projects in process of changing its attributes, dates, or resources. When a project is in draft state, timesheets can not be filled in for these projects. |
| WAITING FOR RESOURCES ASSIGNMENT | A project receives this status when resources are requested for the project. In this state only the resources assignment can be performed. When resources are assigned, project’s status changes back to “Draft”. |
| WAITING FOR APPROVAL | A project receives this status when its changes require the corresponding order change and need to be approved. After the approval of corresponding order, the project’s status changes to “Current” |
| CLOSED | Project can get the status “Closed” only if the corresponding order is closed. It is not editable state. |

There is one main transition from current state to draft state and back to current (possibly via “Waiting for approval” state). See section “Project changes” above for more information.

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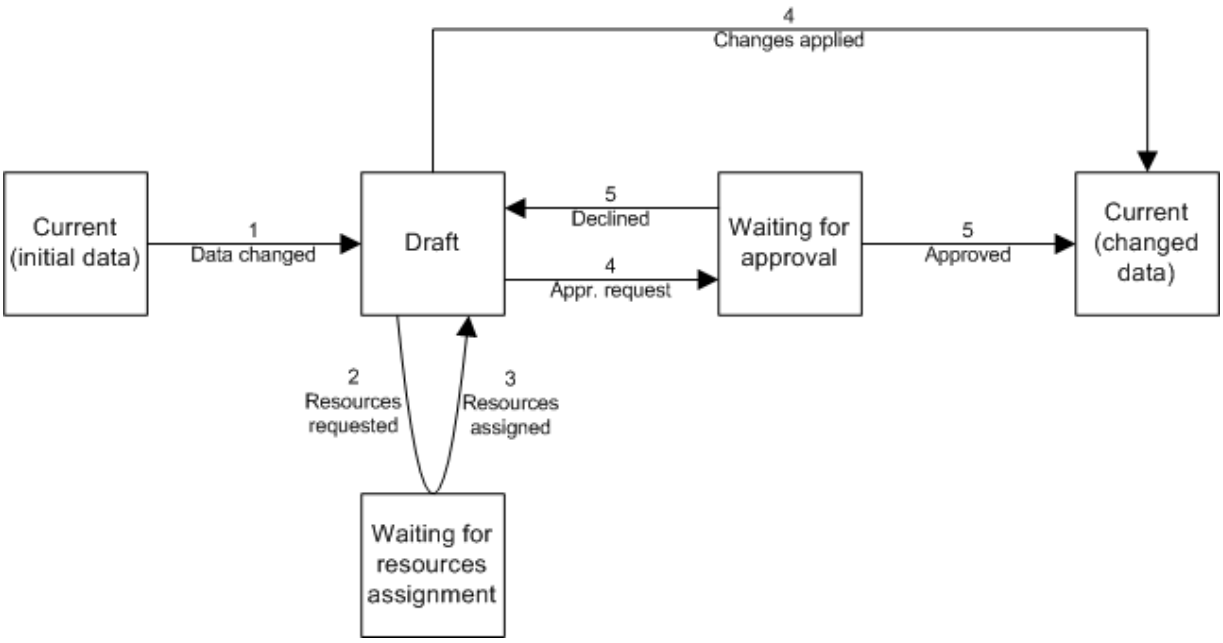


## 2.3 EMPLOYEE PROFILE

**Employee profiles** are the basis for the resource management. If an order or a project needs resources, these resources can be selected based on employee profiles.

In GET Caesar employee profile includes the following parts:

- **Personal information** includes such information as name, age, gender, position, personal photo etc.
- **Skills profile** shows what professional skills this employee has.
- **Certificates** show the list of certificates that this employee owns.
- **Projects participated**. If an employee took part in any phase of any project, this information will be shown here. Project information also includes set of skills that this employee used in the project.

When unit manager look for an employee to assign to some project, the search parameters can include some personal information and skills. Unit manager can also view information about the projects in which this employee participated.

Employee profiles are **filled by employees** themselves and **reviewed by unit managers**.

## 2.4 TIMESHEET

**Timesheet** in GET Caesar has two parts:

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- **Track work**. This part is used by an employee to inform the system how much time he or she spent for particular phase in particular project. This information is used by the system to calculate real project costs and resources usage.

- **Set absence**. This part is used by employee to inform unit manager about his or her planned periods of absence (for example vacations, trainings, etc). During the periods of absence the employee can not participate in projects. There is a system directory of possible absence reasons. This directory can be changed via administration console.

Both parts should be **reviewed and approved by unit manager**. After unit manager has reviewed employee's timesheet, timesheet information can not be editable by the employee anymore.

## 2.5 REPORT

**Report** is a non-editable view on business data that is available in the system. Various types of reports can exist in the system.

Currently the following types of reports are available in the GET Caesar:

- **Project Reference Report**
  This report shows all available information for individual project (planned, estimated and real dates, resources and budget usage)

- **Resource Assignment Report**
  This report shows information about participation of employees in projects (their positions, phases, occupancy periods and values in specified project phases)

- **Occupancy Report**
  This report gives information about occupancy of an employee day by day not depending on specific project. It is useful to analyze general resources usage in the company.

- **Projects Overview Report**
  This report presents a condensed view on a group of projects and delivers information like budget and resource usage or work in progress

- **Department overview report**
  This report presents on an annual basis with monthly granularity the relation between planned capacity (internal and external headcount) and required resource utilization.

## 2.6 SECURITY

Any user of the GET Caesar has **login name** and **password**. **Access rights** of the user are associated with the user's login name.

The following concept is used for security management:

1. Each user of the GET Caesar system has its own **personal profile**.

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2. This personal profile is associated with a security record. The necessary attributes of a security record is login name and password.

3. User group is a named group of security records (for example, user group “Unit managers” can keep security records of all unit managers).

4. Security role is a named set of permissions (for example, role “Approving authority” allows the owner of this role to approve orders and projects).

5. Permission is the right to perform single operation on an object (for example permission can be “View object attributes” or “Create object”).

When the system is installed, the following things have to be configured to support correct system behavior:

1. **User groups** must be defined;

2. Security roles must be defined and permissions for these roles must be assigned;

3. All user groups must be assigned corresponding security roles.

Once the above actions are performed, process of creation of a new user requires only 4 steps:

1. Personal profile must be created for this user (it is not necessary to fill data to this profile at this point);

2. Security record for this user must be created;

3. Security record must be associated with the personal profile;

4. Security record must be put to appropriate user group.

There are five predefined user groups and four predefined security roles in the GET Caesar. The following tables show the description of these groups and roles and dependency between them:

**User groups**

| User group | Description |
|---|---|
| Project Coordinators | This user group contains users that are project coordinators. |
| Project Managers | This user group contains users that are project managers |
| Unit Managers | This user group contains users that are unit managers |
| Employees | This user group contains users that are simple employees |
| System administrators | This user group contains users that are GET Caesar system administrators. |

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**Roles**

| Role | Description |
|---|---|
| Approving Authority | This role allows its owner to approve project manager actions |
| Projects Controller | This role allows its owner to view all reports |
| Project Manager | This role allows its owner to create and change his or her order or project and see project reports |
| Unit Manager | This role allows its owner to change/approve his or her unit employees data and timesheets and see employees reports |
| Employee | This role allows its owner to fill in his or her personal profile and timesheets |
| System administrator | This role allows its owner to access administration console, create new users and change security preferences |

**User groups and roles dependencies**

| User group | Associated roles |
|---|---|
| Project Coordinators | Approving Authority<br>Projects Controller<br>Employee |
| Project Managers | Project Manager<br>Employee |
| Unit Managers | Unit Manager<br>Employee |
| Employees | Employee |
| System administrators | System administrator |

Depending on the security requirements in the company it is possible to change dependencies between roles and user groups. It is also possible to define new user groups and new roles.

In the rest of this document the word "**role**" is often used to designate a user group. The difference between these two notions is important for GET Caesar system administrator, but for other users it is not so useful.

## 2.7 SYSTEM DIRECTORIES

All static business data in the system is stored in so called **system directories**.

**For example**, let's consider two system directories: "**Project types**", that contains the list of project types that is used in the system and "**Project phases**" containing list of possible project phases.

Imagine that there are three possible types of projects that can be started in the company: Software Development, Monthly Company Magazine and Software Processes Engineering.

Let's also imagine that these project types have the following phases:

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| Project type | Phase |
|---|---|
| Software Development | Planning<br>Requirements<br>Design<br>Implementation<br>Testing |
| Monthly Company Magazine | Information Gathering<br>Articles Compilation<br>Magazine Design<br>Publishing |
| Software Processes Engineering | Process Concept<br>Process Definition<br>Pilot Project<br>Process Integration |

In this example there should be two system directories defined in the system that should contain the following data:

| System directory name | System directory contents |
|---|---|
| Project types | Software Development<br>Monthly Company Magazine<br>Software Processes Engineering |
| Project phases | Planning<br>Requirements<br>Design<br>Implementation<br>Testing<br>Information Gathering<br>Articles Compilation<br>Magazine Design<br>Publishing<br>Process Concept<br>Process Definition<br>Pilot Project<br>Process Integration |

Now, everywhere in the system where information about project type or project phase should be entered, the system will offer the user selection from the system directory data. It will not be allowed to enter arbitrary data. This concept ensures the consistency of static business data (for example, the situation when the same supplier is called different names is avoided).

If the data in the system directory is changed or the new data is entered by the system administrator, then it will change everywhere in the system.

Currently the following system directories are defined in the GET Caesar:

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| Name | Description |
|---|---|
| Project types | This directory contains all project types used during the order creation process. Each project type has name and a set of corresponding phases. These phases are taken from the "Phase types" directory. |
| Phase types | This directory contains all possible project phases that can be used in projects of certain project type. Each project phase has a name. |
| Expense types | This directory contains all possible cost types that can be referenced in orders and projects. Each cost type has a name. For example, "Investment Costs" or "External Costs" |
| Certificate types | This directory contains all possible certificates that can be selected during the personal profile infill process. For example, "Java Developer" or "MSP". Each certificate has a name and owner (the issuing company). The owner is selected from the directory of certificate owners |
| Certificate owners | This directory contains all possible certificate issuing authorities. For example, "Sun Microsystems" or "Microsoft Corporation" |
| Skills | This directory contains all possible skills that can be selected during personal profile infill or resources assignment/search. Each skill has a name. Skills are grouped by categories. For example, "J2EE" or "C++" skill are included into category "Software Development" |
| Positions | This directory contains all positions in the company. Each position has a name and a cost. For example, Software Engineer can cost 400 Euro per day, whereas Business Analyst can cost 500 Euro per day. |
| Customers | This directory contains all customers that can order a project. Each customer has the following fields: Company name, Company Address, Contact Person Name, e-mail, phone. |
| Cost centers | This directory contains all possible cost centers in the company. Each cost center has a name and a number. For example, cost center in Germany has number 01 whereas cost center in Austria has number 02. |
| Calendar | This directory contains non-standard holidays or non-standard working days. For example, if the company works on a certain Sunday, this day must be entered into the directory. |
| Departments | This directory contains all departments in the company. Each department has a name and a chief. |
| Suppliers | This directory contains all possible suppliers whose names are used during the invoices tracking. Each supplier has name, address, e-mail and a phone number. |

There is no way to add a new directory.

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# 3 BUSINESS PROCESSES

There are 10 main business processes supported by the GET Caesar system. Each of these business processes can be described as collaboration between three things:

- Role;
- Set of system entities;
- Information flow.

A user in certain role has to perform certain actions (which mean entering information into the system) with certain entities.

A **business process** starts when one of the following occurs:

- **Certain business activity** should be started in the company. For example, some project must be started as a result of meeting with potential customer.

- **Periodical process** should be started. There are several processes that should be performed periodically. For example, each employee should fill in his or her timesheet once a week. It does not depend on any company business activity but is necessary to track resources usage in projects.

The frame process of roles interaction is illustrated in the picture below. Main processes there are order creation and project tracking. Both of them include interaction with unit managers when resources are required and with projects coordinator when approval is required.

During the **project tracking process** employees' timesheets and absence are taken into account.

The **finishing process** is the order closure.

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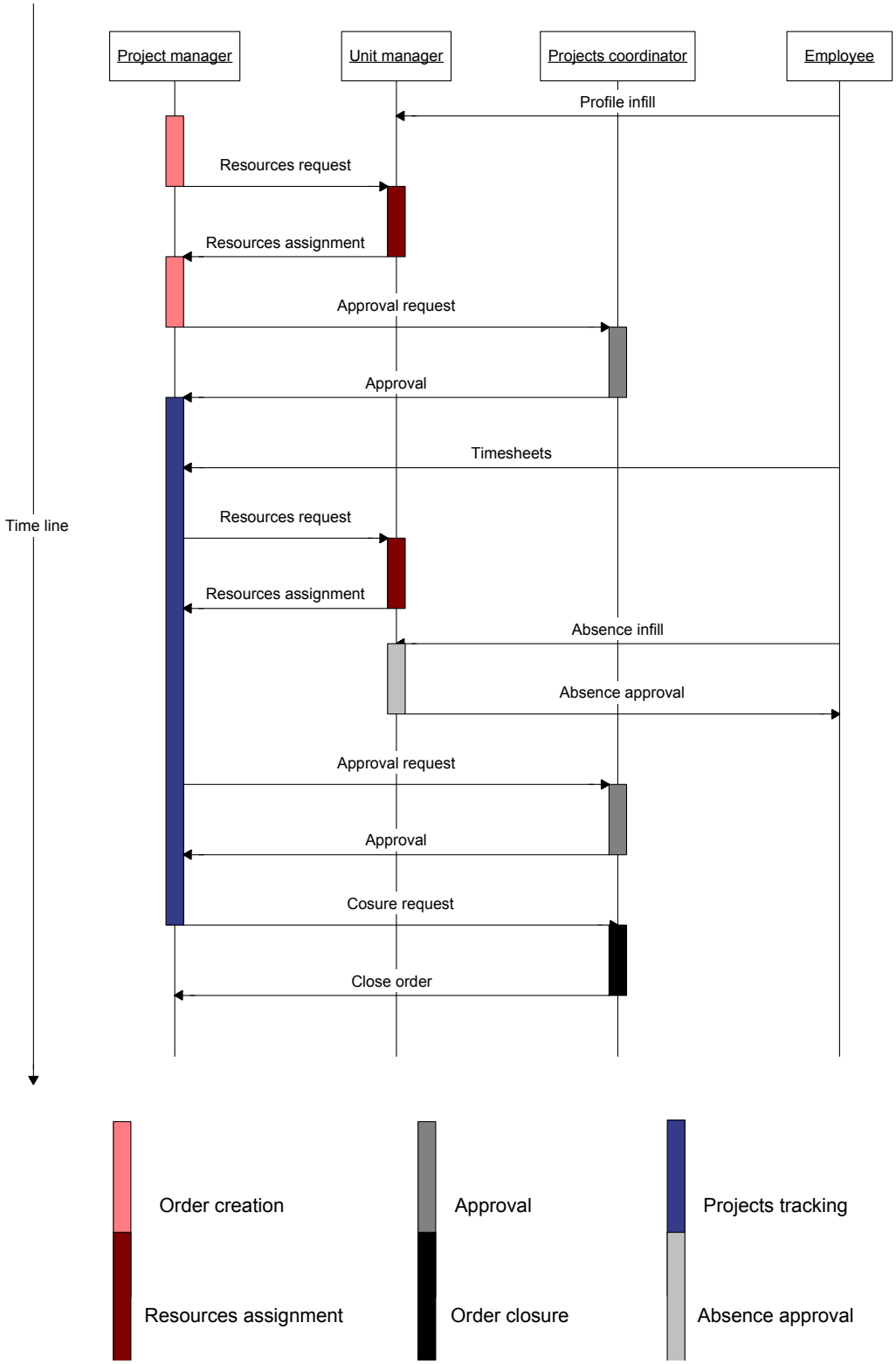


Let's consider in more details each of the participating business processes.

## 3.1 ORDER CREATION

| | |
|---|---|
| **Role that starts the process** | Project manager |
| **Start condition** | There is a business need to start a new project. |
| **End condition** | Order is created and approved by approving authority (a project can be started only when order is approved) |

**Order creation** process is the initial process in the project related processes chain. Its goal is to create project order. During the order creation process such important project parameters as deadlines, resources and budget will be defined.

Project manager must do the following during the **order creation**:

1. **Create the new order**. Right after creation the order will get status "NEW".
2. Fill in **general order information**.
3. Define **deadlines** for **all project phases.**
4. Define **budget** for the project. On this step project manager can only plan costs that do not depend on resources. The resources costs are defined automatically by the system when resources are assigned (see the next steps).
5. **Form resources requests** for all phases.
6. **Send resources requests** to the unit managers that are responsible for requested resources (the unit managers are defined by the system automatically based on requested people positions and skills). After the resources request has been sent, the order status changes to "WAITING FOR RESOURCES ASSIGNMENT" and the resources assignment process starts.
7. **Wait for the resources assignment** notification from the unit managers. When all unit managers assign resources, the project manager receives notification about it and the order changes its status back to "NEW"
8. **Review the assigned resources** and if some of them are not sufficient, form the request and send it again to the corresponding unit managers (the order status changes the same way as in steps 6-7 )
9. When all resources are assigned and they are sufficient, **review the total budget** of the project (it is the sum of the resources costs and other costs)
10. After all data in the order are filled in, **submit the order for approval** to the approving person. Right after the approval request was sent, the order's status changes to "WAITING FOR APPROVAL"
11. If the **order is declined**, order status will change back to "NEW". In this case project manager can change order parameters and send it for approval again, or delete the order.

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12. If the **order is approved**, the corresponding **project will be automatically created**. The new project will be initialized by the information from the order. The order and the new project both get status "CURRENT". This is the finish of the order creation process.

## 3.2 RESOURCES ASSIGNMENT

| | |
|---|---|
| **Role that starts the process** | Project manager |
| **Start condition** | Project manager sends resources request to unit manager |
| **End condition** | Project manager receives notification from unit manager that required resources are assigned |

The **goal** of the resources assignment process is to **find people** that **satisfy** project manager **requirements** and assign them to the project. During this process the system automatically checks occupancy of the people in other projects.

The resources assignment process is initiated when project manager sends resources request list to unit managers, and the order gets status "WAITING FOR RESOURCES ASSIGNMENT".

Each unit manager has to do the following steps during the **resources assignment process**:

1. For each resource request that is assigned to the unit manger, he or she has to **assign one or more people**. If there are no people in the organizational unit that satisfy the request or all people are occupied in other projects, unit manager can leave the request empty. In this case project manager can change the parameters of the resources request and send it again.

2. When all resources requests are filled in, the unit manager must **send the notification to the project manager**.

3. When all unit managers fill in all requests for the specified project, project manager receives notification about it and the order status changes back to "NEW". Project manager can **review** it and **send it back** to those unit managers whose choice was not sufficient for the requested position. In this case unit managers have to repeat steps 1-2.

4. The process is finished when the **project manager is satisfied** with the resources assignment.

## 3.3 ORDER APPROVAL

| | |
|---|---|
| **Role that starts the process** | Project manager |
| **Start condition** | Project manager sends approval request to approving person |
| **End condition** | Project manager receives notification from approving person about approval or disapproval |

The **goal** of the order approval process is to ensure that important actions are reviewed and accepted by a person that can make decisions concerning money and resources.

Most important actions in the system can not happen without approval of the approving authority.

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The **approving process** is initiated when project manager submits new order for approval. The order status in this case changes to "WAITING FOR APPROVAL". Approving person receives notification about waiting for approval order. During this step approving person has to perform the following steps:

1. **Review** the order the needs approval including general order information, information about deadlines and budget.

2. **Approve** or decline the order. If the order is approved, its status changes to "CURRENT", otherwise back to "NEW".

3. In case of **disapproval**, project manager can delete the order or change the parameters of the order and send it back for approval. The process finishes when the order is **deleted** or **approved**.

## 3.4 EMPLOYEE PROFILE INFILL

| | |
|---|---|
| **Role that starts the process** | Employee |
| **Start condition** | Employee profile infill process should be performed in the beginning of the GET Caesar system integration into the company by each employee. Later employees must update profile information on a regular basis. |
| **End condition** | Employee's profile is up-to-date |

Each employee in the company who is supposed to participate in projects must have his or her personal profile in the GET Caesar system. The information from the personal profile is used during the process of resources assignment.

Personal profile data must be updated on a regular basis to ensure that unit managers work with up-to-date employee information.

The following actions must be performed by an employee during **profile infill process**:

1. Fill in **personal data** like name, position, gender, etc.

2. Fill in **professional skills**.

3. When the profile is filled in and saved, **notification about employee data update** is sent to the unit manager.

Unit manager can **view** or **change profiles** of his or her unit's employees.

## 3.5 PROJECT TRACKING

| | |
|---|---|
| **Role that starts the process** | Project manager |
| **Start condition** | Project tracking process should be performed periodically after project start until the project finish |

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| | |
|---|---|
| **End condition** | Project information is updated |

**Project tracking** process is the **core process** of the GET Caesar. Project tracking process can be started only after the project is started (which means that the corresponding order is approved).

The **goal** of the process is to allow the project manager entering into the system **all current information about the project**. Whereas orders keep planned project data, projects store actual project data. For example, they store actual start and finish dates, actual resources usage (from timesheets) and actual budget.

During the project tracking, project manager can initialize other processes like resources assignment (for example, if project manager would like to change or add resources during the project) or approval process (for example, if changes in the project require approval).

The **planned** and **actual** data from orders and project are used for reporting.

There are a number of actions that can be performed during the project tracking process. Most of the actions are optional. The main requirement is that the project information must be up-to-date. The set of actions is the following:

1. Change **project start** and **finish dates** (these changes require approval and initiate approval process).
2. Change **project planned budget** (these changes require approval and initiate approval process).
3. Change **start and finish dates of the phases** (these changes can also require resources assignment if, for example, finish date is moved to a later date. In this case the resources assignment process can be initiated)
4. Change **resources** that are assigned to the project phases (this change requires resources assignment and initiates resources assignment process).
5. **Track invoices** that are paid during the project.
6. **Start phases** (the project is considered to be started when the first project phase is started).
7. **Pause phases**.
8. **Finish phases** (the project is considered to be finished when the last project phase is finished).

### 3.5.1 RESOURCES RE-ASSIGNMENT

Quite often in running projects it is necessary to change or add resources. There are various reasons for this:

- Project or phase deadlines are moved;
- Resources availability is changed (e.g. in case of illness);

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- Other project with higher priority is started;
- Some other …

All of these changes require **resources re-assignment**. There is a standard resources assignment process supported by the system, but it can be a big overhead to use the process for relatively small changes in project. **For example**, if currently running phase must be continued several days more then planned (which is quite often situation in projects) it does not make sense to form resources request, send it to unit manager and wait for answer. This is often not possible to wait in this situation and usually it is necessary to use the same resources that were used before in this phase. Even if these resources are already busy in other projects, they must be used in this project also. In practice, this leads to over-allocation of resources.

GET Caesar system is developed to be flexible in this situation. In real life it is almost impossible to **avoid resources over-allocation**. The monitoring system has to provide transparent information about this problem, but the solution must be chosen by project managers of the conflicting projects.

There are several **rules** that are used during the **resources re-assignment**. Suppose that there is already several planned phases with assigned resources. The rules are the following:

- **If the phase start date is moved to an earlier date then resources,** whose working period start date is the same as phase start date, automatically allocated for the new period. For example, suppose that there is a phase planned to start on 1st of July and finish on 30th of July. Suppose also that an employee is assigned to this phase for the period from 1st of July to 10th of July. If project manager will move the phase start date to 25th of June, then the employee's period will be automatically changed to be from 25th of June to 10th of July.
- **If the phase end date is moved to a later date then resources**, whose working period end date is the same as phase end date, automatically allocated for the new period. For example, suppose that there is a phase planned to start on 1st of July and finish on 30th of July. Suppose also that an employee is assigned to this phase for the period from 20th of July to 30th of July. If project manager will move the phase end date to 5th of August, then the employee's period will be automatically changed to be from 20th of July to 5th of August.
- **If the phase start date is moved to a later date then resources released from the planned beginning date to the new start date**. For example, suppose that there is a phase planned to start on 1st of July and finish on 30th of July. Suppose also that an employee is assigned to this phase for the period from 1st of July to 10th of July. If project manager will move the phase start date to 15th of July, then the employee is released from this project.
- **If the end start date is moved to an earlier date then resources released from the new end date to the planned end date**. For example, suppose that there is a phase planned to start on 1st of July and finish on 30th of July. Suppose also that an employee is assigned to this phase for the period from 20th of July to 30th of July. If project manager will move the phase end date to 15th of July, then the employee is released from this project.

All other changes of dates require initialization of the resources assignment process.

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## 3.6 TIMESHEETS INFILL

| | |
|---|---|
| **Role that starts the process** | Employee |
| **Start condition** | Timesheets infill process should be performed periodically by each company employee |
| **End condition** | Timesheet is filled in |

**Timesheets** keep information about **real resources usage** in projects. **Resources reports** and **cost calculation** is based on timesheets as well.

Timesheets must be filled in by all company employees on a regular basis. Unit manager can **review** his or her unit employees' timesheets and **approve** them (see the following process).

During the timesheet infill process employee has to do the following:

1. Fill in number of hours that he or she spent for a certain phase of a certain project. Employee can fill in hours for the project only if the project phase is running, and he or she is assigned to this phase.

2. When the timesheet is filled in, unit manager receives notification that the employee has changed his/her timesheet data.

## 3.7 TIMESHEETS APPROVAL

| | |
|---|---|
| **Role that starts the process** | Unit manager |
| **Start condition** | Timesheets approval process should be performed periodically by unit manager. Unit manager must review and approve his/her employees' timesheets |
| **End condition** | Unit manger approves timesheets of all of his or her unit employees |

**Timesheets data** is used for statistical purposes in the company and it is the responsibility of a unit manager to ensure that the data entered by an employee is correct. **Unit manager must review** timesheets of his or her unit employees on a regular basis. When unit manager **accepts** the timesheet information, it becomes not editable for the employee.

The following actions must be performed by unit manager when approving timesheets:

1. **Review** all new (not yet accepted by the unit manager) timesheet information for each employee of the unit.

2. If timesheet information is correct, **approve** it so that the employee can not change it.

3. If timesheet is approved but the employee needs to change it, unit manager can make the timesheet editable again on employee's request.

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The timesheets approval process is finished when all unit employees' timesheets are filled in and approved.

## 3.8 ABSENCE INFILL

| | |
|---|---|
| **Role that starts the process** | Employee or unit manager |
| **Start condition** | Absence infill process should be performed by an employee when he or she is planning absence (vacation, training, etc) in the future. This process can be started by unit manager when the employee is not able to fill in absence him/herself (for example, in case of illness) |
| **End condition** | Timesheet approval request is sent by employee to unit manager (unless the timesheet is filled in by the unit manager) |

**Absence** records keep information about absence periods of employees. This information is used when unit manager searches for resources for projects.

Absence must be filled in by all company employees when any absence is planned. **Unit manager must review** his or her unit employees' absence periods and approve them (see the following process). **Without approval** absence periods are not taken into account during resources search.

There are cases when employee is unable to fill in absence period, for example, in case of **illness**. In this case unit manager can fill in absence him/herself.

During the absence infill process employee has to do the following:

1. Set period of time and reason for absence.

2. When the absence is filled in, unit manager receives notification that the employee has changed his/her absence data.

## 3.9 ABSENCE APPROVAL

| | |
|---|---|
| **Role that starts the process** | Unit manager |
| **Start condition** | Unit manager receives from employee absence approval request |
| **End condition** | Unit manger approves or declines the employee's absence |

**Absence data** is used in the process of resources assignment and it is the responsibility of a unit manager to ensure that all absence periods are entered into the system. **Unit manager must review** absence periods immediately after notification about absence data changed. When unit manager accepts the absence information, it becomes not editable for the employee.

The following actions must be performed by unit manager when approving timesheets:

1. When notification about absence data change is received, review all absence information for employees that changed their absence data

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2. If absence periods are accepted, approve them so that the employee can not change it. After approval this information will be taken into account during the resources assignment process (employee can not be booked for a project phase for the absence period). Employee, whose absence period is approved, will receive approval confirmation.

3. If at the time of absence approval employee has been already booked for some project, the project manager will receive notification.

4. If absence is approved but the employee needs to change it, unit manager can make the absence information editable again on the employee's request

The absence approval process is finished when all unaccepted absence periods are approved or deleted.

## 3.10 ORDER CLOSURE

| | |
|---|---|
| **Role that starts the process** | Project manager |
| **Start condition** | Project manager sends request to approving person to close an order |
| **End condition** | Order is closed by the approving person |

**Order closure** process finishes the chain of the project related processes. After order is closed, its data can not be changed. All information from closed projects is used for statistical purposes.

All employees that participated in closed project will get a **record of project participation**. This record is included into employee profile as professional experience. This experience can be used by unit managers in process of resources assignment.

It is possible that some order needs to be closed while the corresponding project is still running, for example, if project budget is closed, or the customer breaks the contract. In this case the closure procedure is the same. All running and paused phases are finished by the date of order closure.

The following actions must be performed by **project manger** during the order closure procedure:

1. When project manager decides to close the project, he or she sends closure request to the approving person

2. If approving person closes the order, it gets status "CLOSED" and the project manager receives notification about it

The following actions must be performed by **approving person** during the order closure procedure:

1. Once the order closure request is received by approving person, he or she should review the information of the order to be closed

2. Approving person can close the order if there are acceptable reasons for doing it. In this case the order gets status "CLOSED" and the project manager receives notification.

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## 3.11 REPORT VIEW

| | |
|---|---|
| **Role that starts the process** | Any role |
| **Start condition** | Statistical information is needed |
| **End condition** | Report is printed |

A **report** is a certain view on business data stored in the GET Caesar system. Reports present different information about **orders**, **projects**, their **costs**, **resources** and **deadlines**. For example, **projects overview report** shows all projects with their general information, deadlines, resources usage and budget usage. In the similar way, **occupancy report** shows for each employee his or her occupancy per day during certain period of time.

Reports are useful for project managers, unit managers and project coordinators because they show chosen business data in compact form, ready for printing.

There are several reports in the GET Caesar system, offering most required summaries of business data.

The process of viewing reports includes the following actions:

1. Choose one of the available report types (e.g. projects, resources, etc.);
2. Select parameters of the report (e.g. period of time to report and way of sorting data);
3. View report;
4. Print report;
5. Export report to another format.

## 3.12 SYSTEM ADMINISTRATION

| | |
|---|---|
| **Role that starts the process** | GET Caesar system administrator |
| **Start condition** | New users must be created or security parameters must be changed |
| **End condition** | New user created or security parameters changed |

**System administration** process is necessary to support proper system operation. This process includes **security management**, **user management** and **static system data support**.

**Security management** is configuration and tuning of the system according to security concept used for the system (see section “Security” in the chapter “Main concepts”). It includes creation of **user groups**, **security roles** definition**, assignment of object permissions** to roles and the assignment of roles to the user groups. The following actions can be performed during the security management process:

1. Create user groups;
2. Create user roles;

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3. Assign object permissions to the user roles;

4. Assign roles to user groups.

**User management** is responsible for creation of new users, assigning login names and passwords, distributing of users between user groups. The following actions can be performed during the security management process:

1. Create initial employee personal profile;

2. Create employee security record;

3. Assign login name for this security record;

4. Assign password to this security record (or ask employee to assign password);

5. Associate employee personal profile and security record;

6. Distribute security records by user groups.

**Static system data support** provides infill of the system directories. System directories include various predefined lists that are used in information flow of the system. The task of system administrator is to fill in these directories and ensure that they are up to date. For more information on system directories, see section “System directories” in the chapter “Main concepts”. The following actions can be performed during the security management process:

1. Create new records in certain system directory;

2. Fill in parameters of these records.

It is not possible to create new system directories.

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# 4 SYSTEM REFERENCE

This chapter describes in details each screen of the GET Caesar system.

**User interface** in the GET Caesar system is **a role based**. Depending on the role of the user, he or she can see different screens, or different options on the same screens.

For each screen the functionality of the screen will be described for each role separately. Each section in this chapter begins with a table showing what roles have access to the screen being described.

There are five predefined roles in the system:

- Project Coordinator;
- Project Manager;
- Unit Manager,
- Employee;
- System Administrator.

For detailed information on the predefined roles and security issues, please refer to the "Security" section of the "Main Concepts" chapter of the User Manual.

## 4.1 MAIN APPLICATION SCREEN

| | |
|---|---|
| **Roles that can view this page** | All |

Main application screen includes the following parts:

- System header;
- Working section;
- System menu.

**System header** shows system logo part, user name of the person currently logged on to the system and the "LOGOFF" button. After clicking on the "LOGOFF" button, the user will be offered logon screen. This button is used to switch the user or leave the system.

**Working section** shows the system business information. All screens that can be shown in the working section are described later in this chapter.

**System menu** shows the parts of the system that are accessible for the current user. Depending on the role of current user and the system security settings the system menu can look different. The following table shows each menu item with a short description of its sub-items.

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| Menu item | Sub-items | Description |
|---|---|---|
| ORDERS | | After clicking on this item, the system shows orders screen. Orders screen contains all orders divided into several categories by status. Depending on the role, user can see only those categories that are allowed to see in this role. |
| | CURRENT ORDERS | After clicking on this item, the system shows orders that have status “Current”. |
| | NEW ORDERS | After clicking on this item, the system shows orders that have status “New”. |
| | WAITING FOR RESOURCES ASSIGNMENT | After clicking on this item, the system shows orders that have status “Waiting for resources assignment”. |
| | WAITING FOR APPROVAL | After clicking on this item, the system shows orders that have status “Waiting for approval”. |
| | CLOSED | After clicking on this item, the system shows orders that have status “Closed”. |
| PROJECTS | | After clicking on this item, the system shows projects screen. Projects screen contains all projects divided into several categories by status. Depending on the role, user can see only those categories that are allowed to see in this role. |
| | CURRENT PROJECTS | After clicking on this item, the system shows projects that have status “Current”. |
| | DRAFT PROJECTS | After clicking on this item, the system shows projects that have status “Draft”. |
| | WAITING FOR RESOURCES ASSIGNMENT | After clicking on this item, the system shows orders that have status “Waiting for resources assignment”. |
| | WAITING FOR APPROVAL | After clicking on this item, the system shows orders that have status “Waiting for approval”. |
| | CLOSED | After clicking on this item, the system shows orders that have status “Closed”. |
| TIMESHEETS | | After clicking on this item, the system shows timesheets screen. |
| EMPLOYEES | | After clicking on this item, the system shows<br>• List of unit employees, if the current user is a unit manager<br>• Personal profile, if the current user is an employee |
| | PERSONAL PROFILE | If the current user is an employee, this menu item is not shown.<br>If the current user is a unit manager, then after clicking on this item, the system shows personal profile of the current user. |

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| | | |
|---|---|---|
| REPORTS | | After clicking on this item, the system shows the list of available reports.<br>Depending on the role of the user, the list of reports can look different. |
| | PROJECTS | Project report shows all available information on the chosen project. |
| | PROJECT OVERVIEW | Projects overview report shows compact overview on several chosen projects. |
| | EMPLOYEES | Employees report shows information about participation of employees in projects. |
| | OCCUPANCY | Occupancy report shows information about occupancy of employees in the chosen unit. |

Each screen mentioned in the table above is described in detail later in this chapter.

## 4.2 LOGON SCREEN

**Roles that can view this page** All

**Logon screen** is the first screen that you see when you try to access the GET Caesar. In order to access the internal system data, a user must have user name and a password. In order to receive new or change existing user name and password, you should contact GET Caesar system administrator.

## 4.3 ORDERS

This part of the system is responsible for **order management**. It works with "Order" concept and supports such business processes as Order Creation, Resources Assignment and Order Approval.

Each screen of this part of the system is described below.

### 4.3.1 ORDERS LIST SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit Manager<br>• Projects Coordinator |

Orders list screen is shown when user clicks on the "ORDERS" menu item on the main menu.

Orders screen contains links to groups of orders identified by order statuses. There are 5 order statuses described in detail in section "Order" of chapter "Main concepts" of the user manual:

- NEW ORDERS are the newly created orders that were not approved and do not have corresponding projects.
- CURRENT ORDERS are the orders that were approved and have corresponding current project.

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- WAITING FOR RESOURCES ASSIGNMENT orders are the orders for which resources were requested by project manager, but not yet assigned by unit manager.
- WAITING FOR APPROVAL orders are the orders that are submitted for approval to the approving authority by the project manager.
- CLOSED ORDERS are cancelled orders or the orders that were closed as a result of successful project finish.

Depending on the role, the user can see only links to those groups of orders that he or she has access to.

After clicking on the one of the accessible links user sees a list of orders of the chosen status. The following rule defines what orders the user can see in this list:

- **Projects coordinator** can see only orders where he or she is assigned as approving person. Approving person is assigned during the process of order creation.
- **Project manager** can see only orders where he or she is assigned as project manager. Project manager is assigned during the process of order creation.
- **Unit manager** can see only orders where he or she should assign resources. The unit managers who should assign resources are defined by project manager during the formulation of resources request.

Depending on the role the user can perform different actions with the orders in the list. The following table shows the access rights for the order statuses for the predefined roles and functions that can be performed on the orders:

| Role name | Corresponding order statuses | Functions allowed |
|---|---|---|
| Projects Coordinator | WAITING FOR APPROVAL | View order information<br>Approve order<br>Decline order |
| | CURRENT ORDERS | View order information<br>Close order |
| Project Manager | NEW ORDERS | View order information<br>Edit order information<br>Delete order |
| | CURRENT ORDERS | View order information<br>Close order |
| | WAITING FOR RESOURCES ASSIGNMENT | View assigned resources |
| | WAITING FOR APPROVAL | View order information |
| | CLOSED ORDERS | View order information |
| Unit Manager | WAITING FOR RESOURCES ASSIGNMENT | Assign resources |

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Besides the functions described in the table above, all users can **sort tables** data by clicking on the column header.

Project manager can **create new order** by clicking on the "NEW ORDER" button. During the process of order creation project manager will work with the following screens:

- Order general information screen;
- Order phases and resources screen;
- Order budget screen;
- Prepare resources request screen;
- View resources request screen;
- Send resources request screen.

The description of these screens and their parameters see in corresponding sections.

## VIEW ORDER INFORMATION

This function shows the following screens as read only:

- Order general information screen;
- Order phases and resources screen;
- Order budget screen.

The description of these screens and their parameters see in corresponding sections.

## APPROVE ORDER

By approving the order projects coordinator changes the status of the order to "CURRENT". The notification will be sent to the project manager of this order saying that this order was approved. The corresponding project will be automatically created for the approved order. The status of the project will be "CURRENT". All the phases in the newly created project will have status "NOT STARTED".

## DECLINE ORDER

After declining the order notification will be sent to the project manager of the order saying that the order was not approved. The status of the order will be changed back to "NEW". No project will be created.

## CLOSE ORDER

If a project manager tries to close the order, only the notification will be sent to the approving person of the order asking to close the order. The order will not be closed in this case and will not change its status.

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If approving person closes the order, its status is changed to “CLOSED” and notification is sent to the project manager of the order saying that the order was closed.

Usually approving person closes the order after receiving notification from the project manager that tried to close the order.

## EDIT ORDER INFORMATION

During the editing of the order information project manager will work with the following screens:

- Order general information screen;
- Order phases and resources screen;
- Order budget screen;
- Prepare resources request screen;
- View resources request screen;
- Send resources request screen.

The description of these screens and their parameters see in corresponding sections.

## DELETE ORDER

Only the order in status “NEW” can be deleted. When an order is deleted, all information about the order is removed from the system and all resources assigned for this order will be released.

## VIEW ASSIGNED RESOURCES

Project manager can view resources that were assigned to his or her order during the resources assignment process. During this action the order has status “WAITING FOR RESOURCES ASSIGNMENT”. It means that not all of the unit managers have finished resources assignment.

During the viewing assigned resources project manager will work with the following screens:

- View resources request screen;
- Resources screen.

The description of these screens and their parameters see in corresponding sections.

## ASSIGN RESOURCES

During the resources assignment process unit manager will work with the following screens:

- View resources request screen;
- Resources screen;

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- Search resources screen.

The description of these screens and their parameters see in corresponding sections.

### 4.3.2 ORDER GENERAL INFORMATION SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Projects Coordinator<br>• Project Manager |

Order general information screen consists of two parts: “Order information” and “Project information”.

Order information has the following attributes:

- **Order name**. Order name is a line of text describing in short the goal of the project, for example “Development of corporate web site”.

- **Order type**. Order type can be chosen from the predefined list of order types (system directory “Project types”). This list is defined in administration console. Depending on the chosen order type, the corresponding project can contain only specific set of project phases. The set of phases corresponding to an order type is defined in the administration console.

- **Order status**. Order status is defined automatically by the system, depending on the action performed on the order. The order statuses are described in detail in the “Order” section of the “Main concepts” chapter.

- **Order ID**. Order ID is a unique identification number of this order in the GET Caesar system. The order ID is defined automatically after the order is saved for the first time. The corresponding project has the same number.

**Project information** part has the following fields:

- **Approving person**. Approving person is an employee of the company that has the right to approve actions performed by the project manager of this order. Approving person receives notifications about the order and the corresponding project changes (for example, if order has to be changed, or project phase has been started). Some important actions of the project manager can not be performed without approval of the approving person, for example, moving the final deadline of the project, or order closure

- **Project manager**. Project manager is an employee of the company who is responsible for the successful execution of the project requirements. Project manager must plan the project execution during the order creation and track the project changes during the project tracking process.

- **Customer**. Customer is a company or any other organization that placed the order. The list of possible customers is defined in the administration console (“Customers” system directory).

- **Start date**. Start date of the project is a date when the corresponding project must be started. Usually, the project start date is the same as the start date of the first project phase.

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- **Finish date**. Finish date of the project is a date when the corresponding project must be finished. Usually, the project finish date is the same as the finish date of the last project phase.
- **Duration**. Duration is automatically calculated number of working days in the project. It is calculated based on the project start and finish dates, weekends and non-standard working and nonworking days. Non-standard working and nonworking days are define din the administration console ("Calendar" system directory).
- **Customer representative** is an arbitrary text field with the name of the customer representative.
- **Project sponsor** is an arbitrary text field with the name of the project sponsor.
- **Description** is a textual description of the project goal.
- **Constraints**. Constraints define dependencies of this project from other reasons. For example, a project constraint can be "This project can not be started before the order N is closed".

Depending on the order status, a user can see different buttons in the lower part of the screen.

| Button name | Corresponding order status | Description |
|---|---|---|
| SAVE | All | Saves the current order without changing its status |
| BACK | All | Goes back to the orders list screen. If new information was entered, but was not saved, it will be lost when this button will be pressed |
| VIEW/SEND RESOURCES REQUEST | All except "NEW" | Shows the "View resources request" screen. See description of the corresponding screen |
| SUBMIT FOR APPROVAL | All except "NEW" | After clicking on this button, the status of the order changes to "WAITING FOR APPROVAL" and notification to the approving person is sent |

### 4.3.3 ORDER PHASES AND RESOURCES SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Projects Coordinator<br>• Project Manager |

The **order phases and resources** screen is divided into two parts. First part, "**Order information**" shows information about the order that was entered on the "Order general information" screen.

The second part, "**Project information**" allows changing of the set of project phases, their start and finish dates and their resources.

The initial set of project phases corresponds to the order type that was chosen on the order general information screen during the order creation procedure. It is possible to use the subset of standard project phases set. Use "Hidden" column at the left side of the "Phases and resources" table to adjust the set of phases in your project.

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During changing of the start and finish dates of the phases, take into account the following rules:

- Initial phases start and finish dates are the same as start and finish date of the project
- Start date of any phase can not be earlier then project start date
- Finish date of any phase can not be later then project finish date
- Phases can intersect. For example, first project phase can finish later then the second project phase starts.
- Duration of the phases is calculated when you click on the "SAVE" button

The buttons in "Prepare resources request" column opens the "Prepare resources request" screen for this phase. See description of the corresponding screen.

Buttons in the lower part of the screen and their actions are the same as for the "Order general information" screen except that the "BACK" button goes back to the "Order general information" screen.

### 4.3.4 ORDER BUDGET SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Projects Coordinator<br>• Project Manager |

Order budget screen also shows order general information at the top of the screen.

The project information part includes information about **order budget**.

"Cost for internal employees" table shows costs, calculated based on the internal resources assigned to this order.

"Cost for external employees" table shows costs, calculated based on the external resources assigned to this order.

Personal profile of each employee has an attribute showing if this employee is internal or external. The cost of an employee in the project depends on position of the employee in the company. See the "Order" section of the "Main concepts" chapter of the User Manual.

Costs for internal and external employees can be calculated only after the resources were assigned by unit managers to this order.

In addition to resources costs, project manager can enter other costs, connected with the order. This can be done using the "Other costs" part of the screen:

- **Cost type** is a type of cost that you can enter. There is a list of cost types defined in the administration console ("Expense types" system directory). For example, cost type can be "Investment costs"

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- **Cost name** is an arbitrary name of the cost that you want to enter. For example, the name of the cost that you want to enter for the "Investment costs" type can be "Hardware purchase"
- **Cost value** is amount of money in EURO that you would like to enter.
- **Description** is an arbitrary textual description of the cost

When you click on the "SAVE" button, the new cost will appear in the resulting table. In order to remove the cost for the list of costs, click on the "DELETE" button. In order to edit the cost, click on the "EDIT" button.

"RESET" button will reset the cost type fields to initial values.

Total costs for this order is calculated automatically.

Buttons in the lower part of the screen and their actions are the same as for the "Order general information" screen except that the "BACK" button goes back to the "Order general information" or "Phases and resources" screen.

### 4.3.5 PREPARE RESOURCES REQUEST SCREEN

| | |
|---|---|
| **Roles that can view this page** | Project Manager |

"Prepare resources request" screen is used by project manager for formulation of resources request to the unit managers. See "Resources assignment" business process description in the User Manual.

Resources request may include several position requests for each phase. Each position request is made for one person that is needed in the phase. For example, if project contains 5 phases, and each phase needs 5 people, then the resources request will contain 25 position requests.

Each of these position requests has such attributes as position name, skills for this position, required period of time, etc.

All position requests for all project phases are included into one resources request that is sent to different unit managers. All unit managers responsible for resources assignment for this project must choose employee that satisfy all position requests, assign them to the project and send this information back to the project manager.

Each "Prepare resources request" screen allows preparation of all position requests for *one phase*. In order to fill in position requests for other phases, the user has to switch between several screens.

In order to view all prepared position requests, the user must use "View resources request" screen described in the following section.

The "Prepare resources request" screen consists of three parts: phase information, prepare request and phase requests list.

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## PHASE INFORMATION

Phase information part contains general information about the project phase including order name, phase name, phase start date, phase finish date and phase duration.

This part also has "VIEW/SEND RESOURCES REQUEST" button that allows the project manager to jump to the overview of all prepared position requests.

## PREPARE REQUEST

Prepare request part is used to choose requirements for the position that will be requested from unit manager. These requirements have the following attributes:

- "**Position**" field must contain required position for this position request. The position is chosen from the predefined list of positions ("Positions" system directory). This is mandatory parameter.
- "**Skills**" field allow project manager to define skills required for this position. The skills tree is defined in the administration console in the "Skills" system directory. Skills parameter is not mandatory.
- "**Unit manager**" field defines the unit manager that is responsible for this position. The value of this field can be selected automatically by the system or set manually by project manager. The algorithm of the automatic selection is the following: the search is made through all employees in the company with the chosen position and skills (if any skills are chosen). If such employees are found, then the system defines to what unit belong most of them. After that the unit manager of this unit is chosen.
- **Occupation period start date** is date when the required employee should start work for this phase.
- **Occupation period finish date** is date when the required employee should finish work for this phase.
- "**Efforts**" field should contain the number of man-days that the required employee has to spent for this phase during the occupation period.
- **Notes** can contain any comments on this position request.
- **Quantity** is a number of employees that should be requested with such attributes.

In order to add the position request to the list of requests, click on the "ADD" button.

Repeat all the steps above for all required employees for this phase.

In order to fill in position requests for other phases use scrolling buttons "NEXT PHASE" and "PREVIOUS PHASE" near the "ADD" button.

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### REQUESTS LIST

All position requests are added to the requests list. The requests list table has the following columns:

- "**Position**" shows the selected position.
- "**Skills**" show the selected skills.
- "**Unit Manager**" shows which unit manager was chosen by the system or manually.
- "**Efforts**" show the entered efforts.
- "**Notes**" show the entered comments.
- "**Resources**" button allows the project manager to see what resources were assigned to this position by the unit manager. This button will show results only after the resources request was set to the unit manager.
- "**Delete**" button removes the position request from the list.

## 4.3.6 VIEW RESOURCES REQUEST SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit manager |

"**View resources request**" screen is shown to the project manager during the resources request formulation and to the unit manager during the resources assignment.

For the project manager "View resources request" screen allows to view *all* position requests that are entered for this project.

For the unit manager this screen allows to view only those position requests that he or she is responsible for (only those position requests that have the name of the unit manager in the column "Unit manager").

This screen consists of two parts: project information and resources request table.

Project information shows the project general information including project name, project description, project start and finish date, project duration, customer, project manager, project manager's e-mail and phone number.

Resources request table is divided into several parts according to the number of phases in the project and has the following columns:

- "**Position**" shows the selected position.
- "**Skills**" show the selected skills.
- "**Unit Manager**" shows which unit manager was chosen by the system or manually.

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- "**Occupation period**" shows the period during which the employee should work for this phase.
- "**Efforts**" show the entered efforts.
- "**Resources**" button shows the "Resources" screen. This screen is used by project managers to view resources that were assigned by unit managers. This screen is used by unit managers to view what resources are requested and search for appropriate employees. See the description of the "Resources" screen in the next sections.
- "**Quantity**" column shows the number of employees that were assigned to this position request by the unit manager. This column will be not empty only after finish of the resources assignment process. It is possible for unit manager to assign several people to one required position.
- "**Resources OK**" column can be seen only by project managers. This column allows the project manager to reject the resources that were assigned to this position request by unit manager. This column will be not empty only after finish of the resources assignment process. Project manager can view the assigned resources and reject them by clicking on the button the "Resources OK" column. If project manager send resources request again, only those position requests that are rejected by the project manager will be sent to the corresponding unit managers.

At the bottom of the screen there are the following buttons (different for project manager and unit manager):

- "SEND RESOURCES REQUEST" will show the "Send resource request" screen that is described in the following section. This button can be seen only by project managers.
- "CONFIRM ASSIGNMENT" will send notification to the project manager saying that a unit manager has assigned resources for the project. This button can be seen only by unit managers
- "BACK TO ORDER" will redirect the user back to the previous screen

### 4.3.7 SEND RESOURCES REQUEST SCREEN

| **Roles that can view this page** | Project Manager |
|---|---|

This screen appears when "SEND RESOURCES REQUEST" button is clicked in the "View resources request" screen.

This screen is very similar to the screen of e-mail message. It contains the following fields:

- "**To**" field contains the recipients of the message. These recipients are the unit managers that are selected in the position requests
- "**Cc**" field can contain other e-mail addresses if the user would like to send the resources request to other people

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- "**From**" field contains the name of the project manager who sends the request
- "**Subject**" field is generated automatically by the system and contains name of the order and the reason for the message
- "**Message**" is generated automatically by the system and contains message to the unit managers and information about the order

"SEND" button will send the message.

"BACK" button will return the user back to the "View resources request screen"

### 4.3.8 RESOURCES SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit Manager |

"**Resources**" screen is used by project managers to view resources that were assigned by unit managers. The screen is used by unit managers to view what resources are requested and search for appropriate employees.

This screen consists of two tables: "Resource request" and "Booked resources".

Table "**Resource request**" has the following columns:

- **Required position** of the employee.
- **Required skills** of the employee.
- **Required occupation period** of the employee.
- **Required efforts** that the employee should spent for this phase.
- **Notes** about the current position request.
- "**Search**" column is shows only to unit managers. It allows the unit manager to search for required employee in his or her unit. The search is made in the "Search resources" screen described in the next sections.

Table "**Booked resources**" has the following columns:

- **Name** of the employee that was assigned to the required position.
- **Position** of the employee that was assigned to the required position. The position can be different from the position that was requested by project manager.
- **Skills** of the employee that was assigned to the required position. Skills of the assigned employee can be different from the skills that were requested by project manager.

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- **Occupation period** of the employee. This period can be different from the requested one.
- **Current efforts** are the efforts that the assigned employee will spend for this phase. These efforts can be different from the requested efforts (requested efforts are shown in the next column).
- **Efforts** are the efforts that were requested by project manager.
- "**Unbook**" column allows the project manager to unbook employees form the position request. This button can be used when project manager is not satisfied by the assigned employee.

Unit manager can assign several people for one request.

**For example**, the requested position can be "Software programmer" for period of one month with skills "Java" and "C++". If unit manager does not have such resources available for the requested period, he or she can assign two people of position "Software programmer" but first of them will work for the first half of the month and have "Java" skill, while the other will work for the second half of the month and use "C++" skill.

### 4.3.9 SEARCH RESOURCES SCREEN

| | |
|---|---|
| **Roles that can view this page** | Unit Manager |

**"Search resources"** screen is used by unit managers to search for resources that were requested by project manager.

Search screen consists of the following parts: "Resources request", "Booked resources", "Search", "Results".

Resources request part shows the same table as in the "Resources" screen there are only two differences:

- **Notes** field is editable. Unit manager can write his comments on this position request, so that project manager can see it when he or she will review assigned resources.
- "**Save**" column contains buttons that allow to save entered notes.

The **"Booked resources"** table is the same as for the "Resources" screen.

**Search part** of the screen contains the following search parameters:

- **Position** of the required employee;
- **Skills** of the required employee;
- **Occupation period start date**;
- **Occupation period finish date**;

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- **Efforts** that the employee should spent during the occupation period.

**By default** all these parameters have values from the position request.

When all required search parameters are entered, click on the "SEARCH" button to search for employees.

The "**Results**" table will show employees that were found based on search parameters. By default this table shows all employees that correspond to the position request.

In order to show all employees in the department click on the "SHOW ALL AVAILABLE UNIT EMPLOYEES". Then the table "Results" will show all unit employees that are available for this period (that do not have absence periods during the required occupation period).

The results table shows names of employees, their positions, skills and efforts during the occupation period.

In order to book employees for the position request, select one or more employees in the table and click on the "BOOK SELECTED" button under the table. The selected employee will be added to the "Booked resources" table.

In order to assign employees to other position requests, use scrolling buttons "NEXT REQUEST" and "PREVIOUS REQUEST".

## 4.4 PROJECTS

This part of the system is responsible for project management. It works with "Project" concept and supports Project Tracking and Resources Assignment business processes.

Each screen of this part of the system is described below.

### 4.4.1 PROJECTS LIST SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit Manager<br>• Projects Coordinator |

**Projects list** screen is shown when user clicks on the "PROJECTS" menu item on the main menu.

Projects screen contains links to groups of projects identified by project statuses. There are 5 order statuses described in detail in section "Project" of chapter "Main concepts" of the user manual:

- CURRENT PROJECTS are the projects that correspond to approved order.
- DRAFT projects are the projects for which some information is changed.
- WAITING FOR RESOURCES ASSIGNMENT projects are the projects for which resources were requested by project manager, but not yet assigned by unit manager.

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- WAITING FOR APPROVAL projects are the projects that are submitted for approval to the approving authority by the project manager.

- CLOSED projects are projects for orders that were closed.

Depending on the role, the user can see only links to those groups of projects that he or she has access to.

After clicking on the one of the accessible links user sees a list of projects of the chosen status. The following rule defines what projects the user can see in this list:

- **Projects coordinator** can see only projects where he or she is assigned as approving person. Approving person is assigned during the process of projects order creation.

- **Project manager** can see only orders where he or she is assigned as project manager. Project manager is assigned during the process of project order creation.

- **Unit manager** can see only orders where he or she should assign resources. The unit managers who should assign resources are defined by project manager during the formulation of resources request.

Depending on the role the user can perform different actions with the projects in the list. The following table shows the access rights for the order statuses for the predefined roles and functions that can be performed on the orders:

| Role name | Corresponding order statuses | Functions allowed |
|---|---|---|
| **Projects Coordinator** | CURRENT PROJECTS | View project information |
| **Project Manager** | CURRENT PROJECTS | View project information<br>Edit project information<br>Manage project |
| | DRAFT PROJECTS | View project information<br>Edit project information<br>Accept project changes<br>Rollback project changes |
| | WAITING FOR RESOURCES ASSIGNMENT | View assigned resources |
| | WAITING FOR APPROVAL | View project information |
| | CLOSED PROJECTS | View project information |
| **Unit Manager** | WAITING FOR RESOURCES ASSIGNMENT | Assign resources |

Besides the functions described in the table above, all users can sort tables data by clicking on the column header.

Below the short description of the functions is given.

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## VIEW PROJECT INFORMATION

This function shows the following screens as read only:

- Project general information screen;
- Project phases and resources screen;
- Project budget screen.

The description of these screens and their parameters see in corresponding sections.

## EDIT PROJECT INFORMATION

During the editing of the project information project manager will work with the following screens:

- Project general information screen;
- Project phases and resources screen;
- Project budget screen;
- Track invoices screen;
- Prepare resources request screen;
- View resources request screen;
- Send resources request screen.

The description of these screens and their parameters see in corresponding sections.

## MANAGE PROJECT

During the project management process, project manager will work with the following screens:

- Manage project;
- Track invoices.

## ACCEPT PROJECT CHANGES

When project changes are accepted two things can happen:

- If project changes does not require approval, then project changes are saved and the projects status changes to “CURRENT” with new project data.
- If the project changes require approval, then project receives status “WAITING FOR APPROVAL” and corresponding order also receives status “WAITING FOR APPROVAL”. The procedure of order approval see in the “Business processes” chapter of the User Manual.

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### ROLLBACK PROJECT CHANGES

When project manager rolls back the changes of the project in "DRAFT" status, then project receives status "CURRENT" with the parameters that the project had before the project was changed.

### VIEW ASSIGNED RESOURCES

Project manager can view resources that were assigned to his or her project during the resources assignment process. During this action the order has status "WAITING FOR RESOURCES ASSIGNMENT". It means that not all of the unit managers have finished resources assignment.

During the viewing assigned resources project manager will work with the following screens:

- View resources request screen;
- Resources screen.

The description of these screens and their parameters see in corresponding sections.

### ASSIGN RESOURCES

During the resources assignment process unit manager will work with the following screens:

- View resources request screen;
- Resources screen;
- Search resources screen.

The description of these screens and their parameters see in corresponding sections.

## 4.4.2 PROJECT GENERAL INFORMATION SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Projects coordinator<br>• Project Manager |

"Project general information" screen is the same as "Order general information" screen with the following differences:

- **Approving person** field is no longer editable;
- **Project manager** field is no longer editable;
- **Customer** field is no longer editable.

It is not possible to change these project attributes in the current project.

## 4.4.3 PROJECT PHASES AND RESOURCES SCREEN

| | |
|---|---|
| **Roles that can** | • Projects Coordinator |

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| | |
|---|---|
| **view this page** | • Project Manager |

"**Project phases and resources**" screen is the same as "Order phases and resources" screen with the following differences:

- It is not possible to change data that is already happened in the past. For example, it is not possible to change phase start date, if this date is before the current date. Also it is not possible to hide a phase that is already started.
- The new column "Status" is added to the "Phases and resources" table. This column shows the phase status. There are four phase statuses: "Not started", "Running", "Paused" and "Finished".

### 4.4.4 PROJECT BUDGET SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Projects Coordinator<br>• Project Manager |

"**Project budget**" screen is the same as "Order budget" screen with the following differences:

- Below each total cost it is now shown actual cost. Actual cost is calculated based on real project data. Actual cost of internal and external resources is calculated based on timesheets. Other actual cost are calculated based on invoices
- New column "**Track invoices**" is added to the costs table. The buttons in this column open "Track invoices" screen. This screen is used by project managers to enter invoices that he or she received and paid during the project tracking process

### 4.4.5 TRACK INVOICES SCREEN

| | |
|---|---|
| **Roles that can view this page** | Project Manager |

"**Track invoices**" screen is used by project manager to enter invoices that he or she paid during the project.

This screen consists of three parts: "Cost information" and "Invoices".

**Cost information** includes description of the cost to which the invoices are added. This information includes Project name, cost type, cost name, planned cost value and cost description.

**Invoices** part allows project manager to add paid invoices. It includes the following parameters:

- "**Supplier**" is the company that issued the invoice. There is a predefined list of suppliers in the administration console ("Suppliers" system directory).
- "**Invoice number**" is the number of invoice.
- "**Date**" is the date when the invoice was received/paid.

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- "**Amount**" is amount of money in Euro corresponding to this invoice.
- "**Notes**" is a text field containing comments to this invoice.

When you click on the "SAVE" button, the new invoice will appear in the invoices table. In order to remove the invoices from the table, click on the "DELETE" button. In order to edit the cost, click on the "EDIT" button.

"RESET" button will reset the invoice fields to initial values.

In order to fill in invoices for other costs, use scrolling buttons "PREVIOUS COST" and "NEXT COST" below the invoices table.

### 4.4.6 MANAGE PROJECTS SCREEN

| **Roles that can view this page** | Project Manager |
|---|---|

**"Manage project"** screen allows project manager to track project events such as start or finish of project phase, or invoice receipt.

This screen has two parts: "**Manage phases**" and "**Track invoices**".

Manage phases part consists of the table with the following columns:

- "**Phase**" column shows the project phase names;
- "**Estimated start date**" shows the phase start date that is planned in project;
- "**Estimated finish date**" shows the phase finish date that is planned in project;
- "**Estimated duration**" is number of working days between the start and finish dates;
- "**Actual start date**" is a date when this date was actually started by project manager;
- "**Actual finish date**" is a date when this date was actually finished by project manager;
- "**Phase status**" shows the current status of the phase;
- **Start/pause phase** allows to start or pause the phase;
- **Finish phase** allows to finish the phase.

When project manager decides to start the phase, he or she must put the date of start into the "Actual start date" column and click on the "Start Phase" button in the "Start/Pause phase" column. The same actions should be performed for the finishing of the phase. In order to pause the phase, the date should not be entered.

When a phase is started it will appear in timesheets of employee who are assigned to this phase.

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The "**Track invoices**" table allows project manager to see planned project costs and invoiced amount corresponding to those costs.

- "**Cost type**" shows the types of costs that are planned for this project;
- "**Cost name**" shows the planned costs for each type of costs;
- "**Cost value**" shows the planned amount of the cost from project budget data;
- "**Invoiced amount**" shows how much money was already invoiced for this cost;
- "**Description**" shows description of the cost;
- "**Track invoices**" opens the "Track invoices" screen that allows the project manager to enter new invoices. See description of the "Track invoices" screen.

### 4.4.7 PREPARE RESOURCES REQUEST SCREEN

| | |
|---|---|
| **Roles that can view this page** | Project Manager |

"Prepare resources request" screen for projects is the same as "Prepare resources request" screen for orders. The only difference is that resources are now requested for project, not for order.

### 4.4.8 VIEW RESOURCES REQUEST SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit Manager |

"**View resources request**" screen for projects is the same as "View resources request" screen for orders. The only difference is that resources are now shown based on project information, not order information.

### 4.4.9 SEND RESOURCES REQUEST SCREEN

| | |
|---|---|
| **Roles that can view this page** | Project Manager |

"**Send resources request**" screen for projects is the same as "Send resources request" screen for orders.

### 4.4.10 RESOURCES SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Project Manager<br>• Unit Manager |

"**Resources**" screen for projects is the same as "Resources" screen for orders.

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### 4.4.11 SEARCH RESOURCES SCREEN

| | |
|---|---|
| **Roles that can view this page** | Unit Manager |

"**Search resources**" screen for projects is the same as "Search resources" screen for orders.

## 4.5 TIMESHEETS

This part of the system is responsible for tracking of employee's working time and absence. It works with "**Timesheet**" concept and supports such business processes as Timesheets infill, Timesheets approval, Absence infill, Absence approval.

There are two roles that can use the screens available in the timesheets part of the system: Unit manager and Employee. Depending on the role screen look different.

### 4.5.1 TRACK WORK SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Employee |

**"Track work"** screen allows the employee to enter his or her actual working hours for this project. This screen also allows the unit manager to view all working hours that the unit employees entered and approve it.

Let's consider the screen description separately for the two roles.

#### EMPLOYEE

There are two parts of the screen: **calendar** and **work tracking**.

**Calendar** helps to find quickly the necessary week by clicking on it. It is also possible to scroll months by clicking on the buttons "Previous Month" and "Next Month" at the top of the calendar. Current day and week are highlighted by color.

When the employee clicks on any week in calendar, the work tracking part shows corresponding week. It is also possible to scroll weeks from the work tracking part using buttons "PREVIOUS WEEK" and "NEXT WEEK".

For each week the employee sees all phases in projects that he or she was assigned to for the selected week.

For each phase the employee must fill in hours that he or she spent for this phase for each day of the selected week. If the employee is not in time with the current task for this phase, he or she must check the corresponding checkbox in the column "Not in time" and write a reason of not being in time.

When the employee finished filling in working hours for all projects for all necessary weeks, he or she must click on "SAVE" button to save the data.

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Unit manager can approve the entered working hours; in this case data in the track work table becomes not editable. In order to change approved data, the employee has to ask the unit manager to open it for editing.

### UNIT MANAGER

For unit manager the work tracking screen looks almost the same as for an employee. The difference is that the screen of a unit manager has two additional parameters:

- "**Select employee**". This parameter allows unit manager to select an employee of his or her unit. When unit manger selects an employee and clicks on "SHOW" button, the track work table will show data entered by the selected employee for the selected week.

- "**Approved**". This checkbox allows unit manager to approve data entered by an employee. In order to approve working hours, unit manager must check the "Approved" checkbox and click on "SAVE" button. After approval of the unit manager the data becomes not editable for the employee. In order to make the approved data editable for an employee again, unit manager must uncheck the "Approved" checkbox and click on the "SAVE" button.

## 4.5.2 ABSENCE SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Employee |

**"Absence"** screen allows the employee to enter his or her planned periods of absence. This screen also allows the unit manager to view all absence periods that the unit employees entered and approve it.

Let's consider the screen description separately for the two roles.

### EMPLOYEE

"**Absence**" screen allows an employee to enter his or her absence period. Each absence period has three attributes:

- **Reason of absence** can be chosen from the predefined list of absence reasons;

- **Start date** is a start date of the absence period;

- **Finish date** is a finish date of the absence period.

After all the parameters have been entered, the new absence period can be added by clicking on the "ADD" button.

When a new absence period is added to a table it has status "Draft". It means that this absence period was not yet approved by unit manager. In draft status the absence period can still be edited.

"SAVE" button saves the list of absence periods, but does not inform the unit manager about the new absence period entered by an employee.

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"SUBMIT FOR APPROVAL" button saves the list of absence periods and informs the unit manager about the new absence period entered by an employee.

When absence period is approved by the unit manager two things happen:

- The absence period becomes not editable for the employee
- Notification is sent to all project managers who assigned this employee to their projects for the period of time that intersects with the absence period

### UNIT MANAGER

For unit manager the absence screen looks almost the same as for an employee. The difference is that the screen of a unit manager has two additional parameters:

- "Select employee". This selection block allows to the unit manager to choose employee for which the absence periods must be reviewed.
- It is possible for a unit manager to enter period of absence for his or her unit employees. For example, in case of illness employee often can not enter his or her absence period. In this case unit manager can enter absence period him/herself. In order to do it, unit manager has to select employee for which the absence should be entered, select reason, start/finish dates and click on "SAVE" button
- Buttons in "Approved" column allows the unit manager to approve the absence period entered by employees. When absence period is approved by the unit manager, the absence period becomes not editable for the employee and notification is sent to all project managers who assigned this employee to their projects for the absence period
- Button "INFORM EMPLOYEE" send e-mail message to the employee saying about approval of the absence period

## 4.5.3 VIEW ALLOCATED WORK SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Employee |

This screen contains not editable data about participation of employees in projects. Employee can see only his or her allocated work. Unit manager can select employee for which he or she would like to view allocated work.

The allocated work table has the following columns:

- "**Work**" contains data about the project phase that the employee is assigned to.
- "**Actual man/days**" is a number of man/days that are actually spent by the employee in this project phase. This data is taken from the employee's timesheets.

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- "**Remaining man/days"** is a number of man/days that are left for this employee to work in this project phase (it is a subtraction of all planned man/days of this employee in this project phase and the actual timesheets data).
- "**Start date**" is a start date of the period that the employee should work in this project phase.
- "**Finish date**" is a finish date of the period that the employee should work in this project phase.
- "**Phase status**" is the current status of the project phase that employee is assigned to.

## 4.6 EMPLOYEES

This part of the system is responsible for employee's personal profiles. It works with "Employee profile" concept and supports such business processes as Employee Profile Infill.

Each screen of this part of the system is described below.

### 4.6.1 EMPLOYEES LIST SCREEN

| | |
|---|---|
| **Roles that can view this page** | Unit Manager |

"**Employees list**" screen is shown when a user in the role of Unit Manager clicks on the "EMPLOYEES" menu item on the main menu.

This screen contains a table with the following columns:

- **Name** of the employee.
- **Position** of the employee.
- "**Last update**" column shows the date when the profile was last time changed (or the date of creation, if the profile is new).
- "**View**" column allows unit manager to view the employee personal profile.
- "**Edit**" column allows unit manager to change the employee personal profile. See description of the corresponding screen for details.

### 4.6.2 PERSONAL INFORMATION SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Project Manager<br>• Employee |

**Unit Manager** can see and change his or her own personal profile as well as personal profile of his or her unit employees.

**Employee** can see only his or her own personal profile.

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**Project manager** can see only personal profiles of people assigned to his or her project. Project manager can access this page not from the main menu, but from the "Assigned resources" screen.

The personal information screen contains the following employee attributes:

- **The last name** of the employee.
- **The first name** of the employee.
- **Company unit** is the organizational unit of the company where this employee belongs (organizational unit can be department or team). The list of the company organizational units is defined in the administration console ("Departments" system directory).
- **Position** is the position of the employee in the company. The list of possible positions are defined in the administration console ("Positions" system directory).
- **Date** when the employee was **hired** in the company.
- Attribute showing if this employee is currently working in the company or dismissed.
- Attribute showing if this employee is **internal** or **external**. The value of this attribute is taken into account when costs are calculated for an order or for a project. In all reports internal and external costs are shown separately.
- **Level of expertise** shows how experienced the employee is. There are three possible values: low, medium, high. Level of expertise can be used by a unit manager during the assignment of the employee to projects.
- **Sex** (male or female).
- **Phone** is the internal phone number of an employee inside the company.
- **Mobile phone** is the corporate mobile phone number of an employee.
- **E-mail** is a corporate electronic mail address of an employee.
- **Photo** can be loaded from external file in the following formats: *.gif, *.jpg.

When new information is entered, or existing information is changed, you should click on "SAVE" button to save the changes before switching to another screen. Otherwise the data will not be saved.

### 4.6.3 SKILLS SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Project Manager<br>• Employee |

Different roles that can see this screen the same way is described in the "Personal information" screen above.

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"**Skills**" screen contains tree view of skills that can be assigned to employees. These skills are grouped by types (folders in the tree). The tree of skills is defined in the administration console ("Skills" system directory).

In order to fill in your skills, find the skills in the tree and tick it off.

When you have marked all the skills, click on "SAVE" button to save changes.

### 4.6.4 CERTIFICATES SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Project Manager<br>• Employee |

Different roles that can see this screen the same way is described in the "**Personal information**" screen above.

**"Certificates"** screen contains list of certificates of an employee. The list of possible certificates is formed from two system directories: "**Certificate types**" and "**Certificate owners**". Certificate types keep the names of certificates; certificate owners are the companies or organizations that issued this certificate.

Select the appropriate certificate from the list, put the date when you received this certificate and click on "ADD" button to add the selected certificate to the list.

### 4.6.5 PROJECTS SCREEN

| | |
|---|---|
| **Roles that can view this page** | • Unit Manager<br>• Project Manager<br>• Employee |

Different roles that can see this screen the same way is described in the "**Personal information**" screen above.

"**Projects**" screen is a read only view on all projects that the employee has participated in the past. This data is taken from the system and can contain only those projects that are tracked in the GET Caesar.

## 4.7 REPORTS

This part of the system is responsible for reporting. It works with "**Report**" concept and supports "Report View" business process.

There are several types of reports available in the system at the moment.

Each report type is described in detail below.

### 4.7.1 PROJECTS REPORT

| | |
|---|---|
| **Roles that can** | Project Manager |

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| view this page | |
|---|---|

**Projects** report shows all available data for the selected project. A project manager can select only those projects where he or she is assigned as project manager.

Projects report consists of two screens: **project selection** screen and **report output** screen.

On the project selection screen project manager sees his or her projects. In order to view project report project manager should click on the corresponding button in the “View” column.

The report output screen consists of four parts: Project information, Project phases, Project resources and Project costs.

Project information part shows general information of the project including project name, project manager name, approving person, customer, cost center, description, constraints, planned and actual start and finish dates.

All **project phases** and their statuses are shown in a table with the following columns:

- **Phase name**.
- **Status of the phase**. Any phase can have the following statuses: not started, running, paused, finished.
- **Planned start**. Planned start is the phase start date that is taken from the last approved order corresponding to this project.
- **Estimated start**. Estimated start is the phase start date that is taken from the project.
- **Real start**. Real start date is the date when this phase was actually started by the project manager.
- **Planned finish**. Planned finish is the phase finish date that is taken from the last approved order corresponding to this project.
- **Estimated finish**. Estimated finish is the phase finish date that is taken from the project.
- **Real finish**. Real finish date is the date when this phase was actually finished by the project manager.

**Project resources** table shows the following information:

- **Internal resources** are all man days that were spent for this project by internal employees of the company
- **External resources** are all man days that were spent for this project by external employees of the company

Planned value is taken from the last approved order corresponding to this project. Estimated value is taken from the project. Real value is taken from employees’ timesheets.

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**Project costs** table shows the following information:

- **Costs for internal resources** is a product of internal resources man days and position cost of the corresponding employee
- **Costs for external resources** is a product of external resources man days and position cost of the corresponding employee
- **Other costs** are all cost types taken from the order and project budget screen.

**Planned value** is calculated from the data of last approved order corresponding to this project. **Estimated value** is calculated from the project data. **Real value** is calculated from employees' timesheets and invoices.

"PRINT" button shows the printable view of the report. This view can be printed by clicking on the "PRINT" button.

### 4.7.2 PROJECTS OVERVIEW REPORT

| | |
|---|---|
| **Roles that can view this page** | Project Coordinator |

**Projects overview** report gives on one screen short information about all projects (finished, running and planned), their resources, budgets and deadlines.

Projects overview report screen has two parts: report criteria selection and report result.

**Report criteria** selection part gives possibility to change parameters of the projects overview report. The following criteria are available:

- "**Projects**". This criterion allows the user to choose projects which should be included into the overview: all projects or only a subset of all projects.
- "**Status**". The second criterion gives a possibility to choose project by statuses, for example, only running projects or only finished projects. The following rule defines the project status: If at least one phase has status "running", then project has status "running". If all phases have statuses "not started" or "paused" or "finished", then the project status is "paused". If all phases are "not started" then the project is "not started". If all phases are finished then the project is "finished".

By default, the report shows all projects in all statuses.

In order to view the report, click on the "SHOW REPORT" button.

The report output part shows one table for each project status. The tables contain the following columns:

- Project information that includes project name, description, project manager, customer;

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- For running projects all running phases are shows;
- Planned, estimated and actual finish dates;
- Planned, estimated and actual resources usage;
- Planned, estimated and actual budget.

The meaning of "planned", "estimated" and "actual" values are the same as in "Project report".

"PRINT" button shows the printable view of the report. This view can be printed by clicking on the "PRINT" button.

### 4.7.3 EMPLOYEES REPORT

| | |
|---|---|
| **Roles that can view this page** | Unit Manager |

**Employees report** shows information about participation of employees in projects. The information includes period of participation, occupancy value, position and phases.

Employees report screen has two parts: report criteria selection and report result.

**Report criteria** selection part gives possibility to change parameters of the employees report. The following criteria are available:

- "**Employees**". This criterion allows the user to choose employees that need to be included in the rep[ort: all employees or only a subset of all employees.
- "**Sort by**". The second criterion gives a possibility to choose the way of sorting data. The data can be sorted by employees, in this case the report will show all projects for each employee based on the last selection criterion. If the data will be sorted by projects, then the report will show all employees that participated in selected projects based on the last selection criterion.
- "**Activities**". The last selection criterion gives a possibility to choose between planned and finished data. Planned activity is an activity that finishes later then current date. Finished activity is an activity that has finished before the current date.

By default, the report shows planned activity for all employees, sorted by employees.

In order to view the report, click on the "SHOW REPORT" button.

The report output part consists of one table. Depending on the selection criterion "Sort by" the table contains columns in different order. For **sorting by employees**:

- **Employees** column shows one record for each selected employee.
- **Projects** column shows all projects that these employees participated or will participate (depending on the "Activities" selection criterion).

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- **Phases** column shows for each project all phases in which the employees participated or will participate.
- **Positions** column shows positions in which the employees participated or will participate in the project phases.
- **Occupation start date** is a start date of the occupancy period in certain position, in certain phase in certain project for each employee.
- **Occupation finish date** is a finish date of the occupancy period in certain position, in certain phase in certain project for each employee.
- **Occupancy** is occupancy value for this occupancy period in percents.

For **sorting by projects**:

- **Projects** column shows one record for each project.
- **Phases** column shows for each project all phases in which selected employees participated or will participate (depending on the "Activities" selection criterion).
- **Positions** column shows positions in which the employees participated or will participate in the project phases.
- **Employees** column shows all employees that participated or will participate in corresponding position, phase, project.
- **Occupation start date** is a start date of the occupancy period in certain position, in certain phase in certain project for each employee.
- **Occupation finish date** is a finish date of the occupancy period in certain position, in certain phase in certain project for each employee.
- **Occupancy** is occupancy value for this occupancy period in percents.

"PRINT" button shows the printable view of the report. This view can be printed by clicking on the "PRINT" button.

### 4.7.4 OCCUPANCY REPORT

| | |
|---|---|
| **Roles that can view this page** | Unit Manager |

**Occupancy** report shows information about occupancy of employees in project activity for some period of time.

Occupancy report screen has two parts: report criteria selection and report result.

**Report criteria** selection part gives possibility to change parameters of the projects overview report. The following criteria are available:

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- "**Employees**". This criterion allows the user to choose employees that should be included into the report: all employees or only a subset of all employees.
- "**Period**". The second criterion gives a possibility to choose period of time for which the report is needed.

By default, the report shows all employees data for the period of one week before the current date.

In order to view the report, click on the "SHOW REPORT" button.

The **report output** part consists of one table with the following columns:

- "**Employee**" column shows the name of employee
- All other columns are the calendar days for the specified period of time. For each day and each employee two numbers are presented: planned occupancy and actual occupancy. Planned occupancy is taken from project and actual is take from timesheets.

In order to view other pages of the report use scrolling buttons at the top of the table.

"PRINT" button shows the printable view of the report. This view can be printed by clicking on the "PRINT" button.

## 4.8 ADMINISTRATION CONSOLE

This part of the system is responsible for system configuration and security issues. It works with "Security" and "System directories" concept and supports "System administration" business process.

GET Caesar administration console is a web based interface for the GET Caesar system management. In order to access administration console, the following web address should be used:

http://<GET_Caesar_web_address>/admin

<GET_Caesar_web_address> is a URL of the GET Caesar system. The URL of the GET Caesar system is defined during the installation procedure (see GET Caesar Installation Guide).

The main window of the administration console consists of two screens: navigation tree and content screen.

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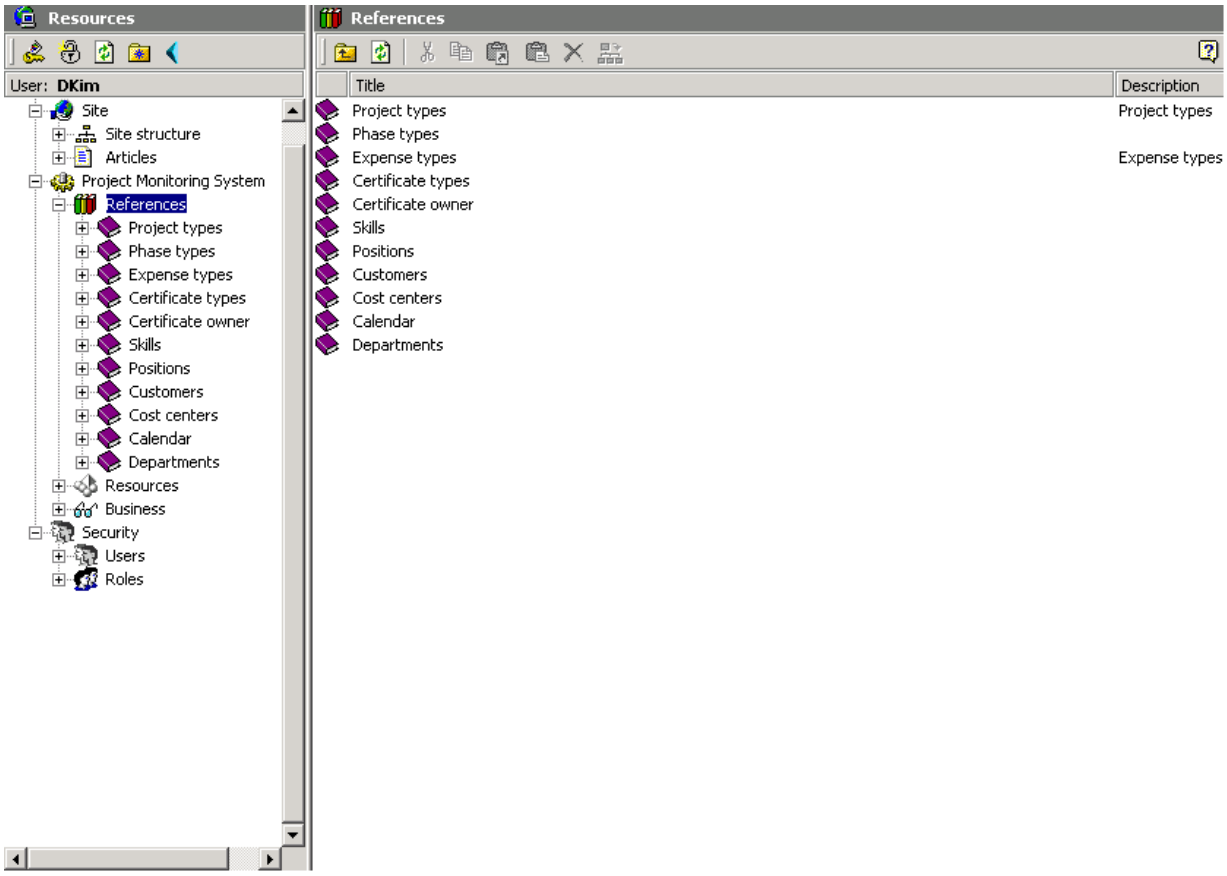


The navigation tree shows all system contents in hierarchical structure, whereas content screen shows the content of a single element chosen in the navigator.

Depending on the type of element, contents screen allows different operations to be implemented on the element.

Some of the folders in the navigation tree are marked by red exclamation mark (). These folders are required for proper system operation and can not be deleted, although the items in these folders can be edited.

The elements of the navigation tree and their main attributes and functions are described later in this chapter.

### 4.8.1 NAVIGATION TREE

The toolbar of the **navigation tree** has the following buttons:

- "**Logon**" button logs off the current user and opens the logon screen.
- "**Change password**" button opens the change password dialog in the content screen. The user must type and confirm the new password.

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- "**Refresh**" button reloads the navigation tree from the web server.

- "**Favorites**" button works the same way as in Microsoft Internet Explorer. The user can add currently chosen element to the list of favorites. The next time when the favorites button will be pressed, the new bookmark will appear in the list.

- "**Minimize**" button minimizes the navigation tree. In order to restore it, the user has to click on the "Maximize" button on the toolbar.

The main elements of the navigation tree are **libraries** and **folders**. **Libraries** can contain other libraries and folders. **Folders** can contain other folders and folder items.

Library defines the type of items that the folders of this library can contain. Two folders in one library can not contain different elements.

For example, all folders in library "Roles" can only contain elements of type "Role". All folders in library "Users" can only contain elements of type "User". We can combine these two different types of elements in one library, containing libraries "Roles" and "Users" and call this common library "Security".

The next sections describe three main upper-level libraries of the GET Caesar system:

- "**Site**" library. This library contains all user screens of the GET Caesar. The elements of this library are web pages. Different permissions for different roles can be assigned for each web page of this library.

- "**GET Caesar**" library contains business data of the GET Caesar system including so called "system directories". System directories are described in the "System directories" section of the "Main concepts" chapter of the GET Caesar user manual.

- "**Security**" library contains security records of all employees divided by user groups and security roles. Security concept of the system is described in the "Security" section of the "Main concepts" chapter of the GET Caesar user manual.

### 4.8.2 SITE LIBRARY

This library may include several other libraries, but for us only one library is important – "Site structure". The "Site structure" library contains all web pages of the GET Caesar system. These web pages are structured hierarchically as shown in the following picture:

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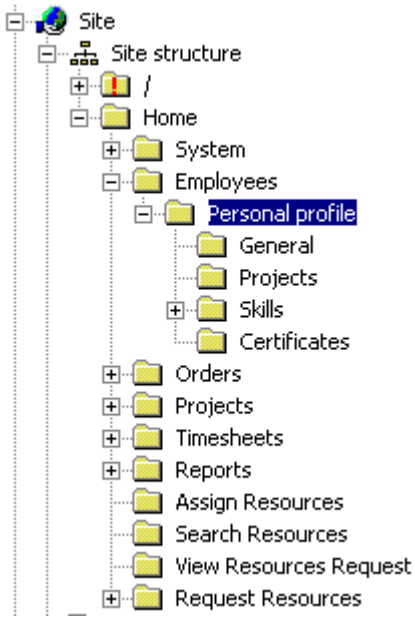


Each folder of this tree is a web page containing one of the screens of the GET Caesar. GET Caesar system administrator can configure access rights for the web pages.

GET Caesar system has a set of predefined roles, for which all access rights are already configured. The manual configuration of the access rights is necessary only if a new role is created, or existing role has to be customized.

Let's see how access right for the page "Personal profile" can be configured. Let's imagine that it is needed to allow project managers to see employees' personal profiles. For this purpose we choose on the navigation tree "Personal profile" item.

**Note: in the navigation tree if you click on the folder icon you will always see folder properties in the contents screen, while if you click on the folder name, for example "Personal profile", you will see folder contents on the content screen.**

We need to change security properties of the folder, so we have to press on the folder icon, not on the folder name. In the content screen we see the properties of the web page "Personal profile"

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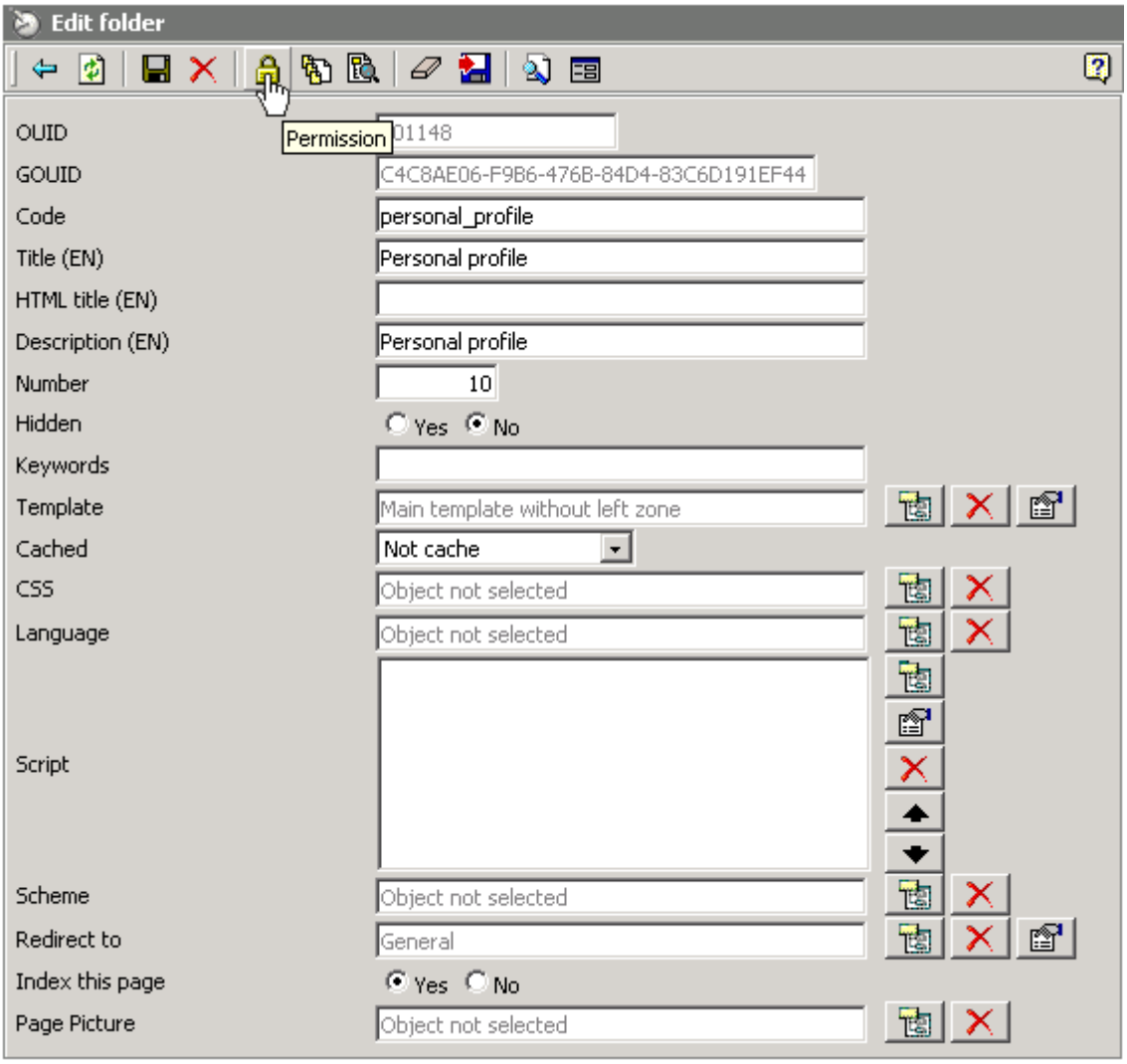


In order to change permissions for the page, click on the “Permission” icon of the folder properties toolbar.

The next screen you see is the security properties of the page. On the left side you see a box with list of roles that have certain permissions for this page. On the right side you see a box with all roles available in the system.

In order to give a role the right to access this page, you need to choose this role in the right box and add it to the left box. In our example, choose role “Project manager” and add it to the left box.

Once the role is added, you can choose what exactly permissions you would like to give to this role (change, create, delete, update, etc.). You must click on the “Save” button to save the changes.

You also can propagate these permissions to all child folders and items of this folder. In order to do it click on the “Save and propagate”. You can also define these permissions for all folders and items that

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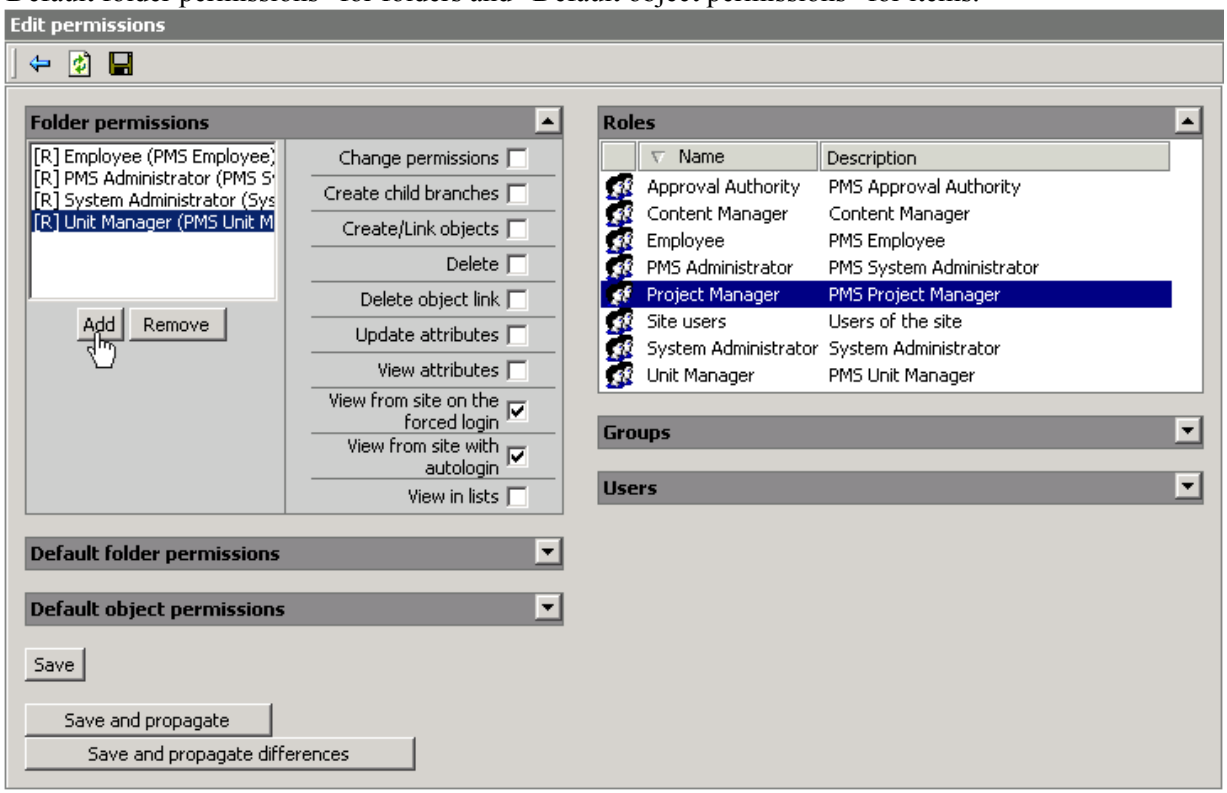
will be created in this folder in future. In order to do it, you have to define the same permissions in the "Default folder permissions" for folders and "Default object permissions" for items.




After saving the changes, project manager will be able to access this page. Remember that these permissions are defined for the page as a whole, not for specific buttons or graphic elements inside the page. For example, if you allow a unit manager role to view current orders list (which is not correct) then the unit manager will see the page, but will not see any orders, because every project manager can see only orders where he or she is assigned as project manager. Unit manager can not be assigned to an order as a project manager, and thus can not see any orders in the list.

### 4.8.3 GET CAESAR LIBRARY

The main library of the system that keeps all business data in the system is GET Caesar library.

All the data in this library is divided into three sub libraries:

- **References library** stores system directories
- **Resources library** stores employees data
- **Business library** stores orders and projects.

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### 4.8.3.1 REFERENCES

The concept of system directories is described in the corresponding section of the “Main concepts chapter”.

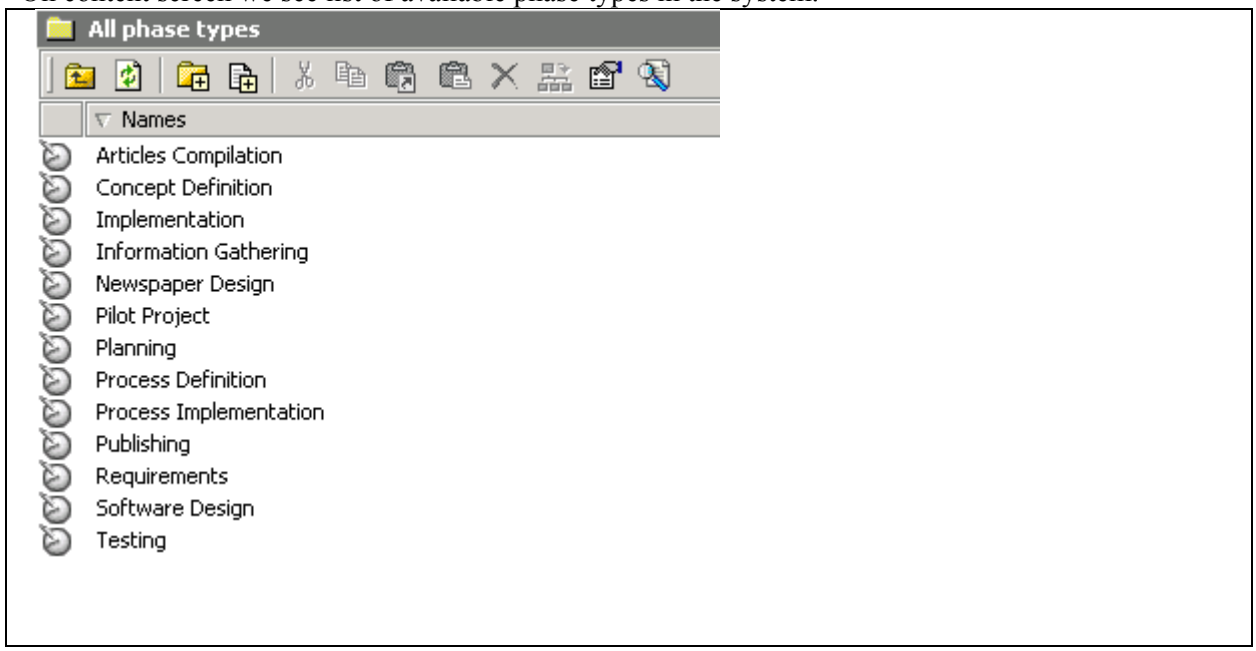
Let’s see how we can edit the system directories.

For example, imagine that you want to define new project type “Furniture purchase” with the following phases: “Market research”, “Furniture trial”, “Purchase”, “Installation”. Before creation of the project type we have to define project phases, because project type has to include phases.

In order to create new project phases, let’s click on the “All phase types” folder name (not an icon) inside the “Phase types” system directory inside the “References” library.

**Note: in the navigation tree if you click on the folder icon you will always see folder properties in the contents screen, while if you click on the folder name, for example “Personal profile”, you will see folder contents on the content screen.**

On content screen we see list of available phase types in the system.




In order to create the new phase click on the button “Add object” in the toolbar. Then enter the name of the phase and its description and click on “Save” button on the toolbar. Perform the same action for the other three phases.

Now you are ready to create the new project type. In order to do it, let’s click on the “All projects types” folder name inside “Project types” system directory inside “References” library. We see the list of existing project types. Click on “Add object” to create new project type. You see the project type creation dialog.

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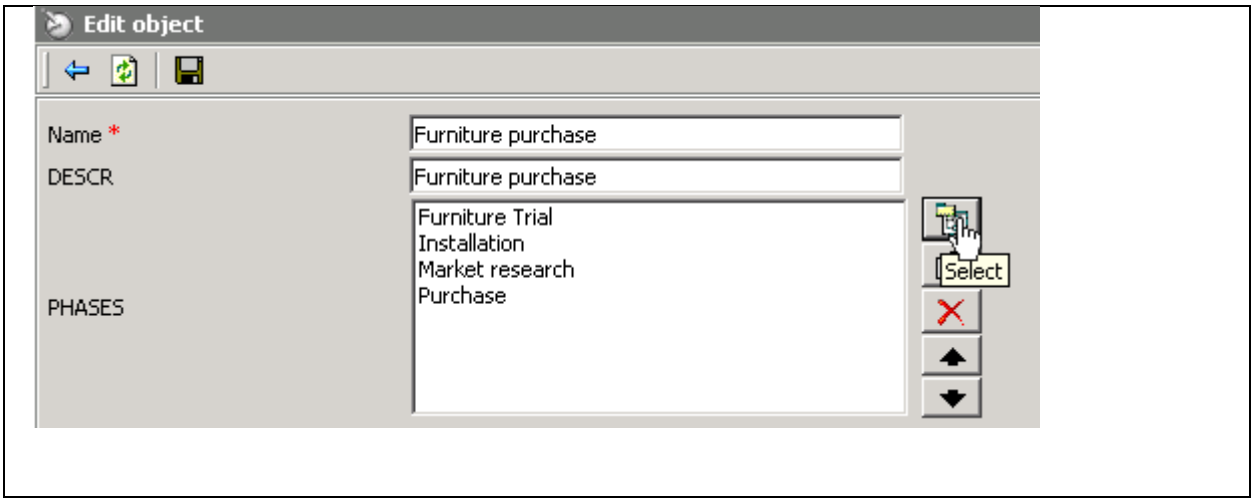


Type the name of the new project type and optional description. In order to select phases for this project, click on the “Select” button. You will see the list of all existing project phases. Select the necessary phases and click “Select button on the toolbar”. The selected phases will be added to the project. Click on “Save” button on the toolbar. The new project type is saved.

Now everywhere in the system, where project type selection is needed, a user will see the new type “Furniture purchase”.

In the similar way all other system directories can be edited.

System directory “**Certificate types**” contains certificates for the personal profiles of employees. Each certificate has name and certificate owner (the company that issued the certificate). Certificate owners are stored in the separate system directory called “Certificate owners”. If you want to add a new certificate and the issuer of the certificate is not included into “Certificate owners” directory, you have to create the certificate owner first.

The “**Skills**” system directory contains hierarchical tree of skills used in GET Caesar. In this tree folders are the groups of skills, for example “Software Development” or “Graphic Design”. Object in the folders are certain skills from the corresponding group. For example, “Java 2” is a skill from group of skills “Java”. “Java” skills group belongs to group “Software Development”. Administrator can change the structure of the tree as well as its contents.

“**Positions**” directory keeps the list of all positions that are defined in a company. Each position has two attributes: name and default cost. Based on the value of the default cost parameter, resources cost is calculated for orders and projects.

System directory “**Calendar**” stores non-standard working and non-working days. For example, if the company is supposed to work on Sunday, this day must be entered to this directory and have attribute “Working Day” set to “Yes”. If, vice versa, some Wednesday is a non-working day for some reason, then this day must be entered into the “Calendar” system directory and the attribute “Working Day” must be set to “No”.

The “**Departments**” system directory stores organizational units of the company. Each department unit has a name and a chief. The department chiefs can be selected from the list of all employees.

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#### 4.8.3.2 RESOURCES

The "**Resources**" library stores all company employees and their profiles. System administrator has to work with this library when there is a need to create new employee.

The process of **creation of the new employee** is the following:

- Creation of the security record for this employee. Security record is necessary for an employee to access the system.
- Definition of employee's role. This is done by copying of the employee security record to one of the use groups.
- Creation of a new profile. Some mandatory fields have to be filled in the newly created profile, all other parameters of the personal profile the employee can fill in him/herself.

The security records, user groups and roles definition are discussed in the "Security library" section below.

The **employee profile** has the following mandatory fields:

- First name.
- Last Name.
- E-mail.
- Position. The value of this field must be chosen from the "Positions" system directory.
- User login. The value of this field must be chosen from the list of security records.
- Department. The value of this field must be chosen from the "Departments" system directory.

Besides "All employees" folder there are several system folders in this library:

- Approving persons;
- Project managers;
- Unit managers.

These folders are used to identify employees that have specific duties. For example, during the process of order creation, project manager must select approving person from the list. This list is formed based on the system folder "Approving persons". If a person is not copied into this system folder, then he or she can not be assigned to a project as approving person.

The same rule works for project managers and unit managers. Note that these folders influence only on the selection lists in the system, not on access rights.

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#### 4.8.3.3 BUSINESS

**Business library** stores all business data that is concerned with orders and projects. There are two corresponding libraries "**Orders**" and "**Projects**".

During the normal operation of the GET Caesar system it is very undesirable to change any data in these folders. It can lead to the inconsistencies in orders or projects data.

The only thing that the system administrator is allowed to do in these folders is view of data.

### 4.8.4 SECURITY LIBRARY

**Security library** keeps data about security configuration of the GET Caesar system. The two main parts of the security library that the system administrator will work with are

- **Users**. This library keeps security records of all employees divided into user groups.
- **Roles**. This library keeps all roles defined in the system.

Different actions can be performed on any object in the system (for example, web page or employee profile object). These actions include, for example, "view", "change", "update", etc.

The permission to perform any of these actions is given to a role. For example, "view" permission on "Order budget" screen can be given to the "Project manager" role, while "Unit Manager" role should not have this permission.

Thus, in the GET Caesar there are set of roles, set of objects, and permissions on objects that are assigned to roles. The process of assigning permissions to roles is described in the "Site library" section of this chapter. Roles are described below in this chapter

Now, the question is how the roles are assigned to users.

Each user in the GET Caesar has personal profile and security record. Personal profile is used by unit managers to assign the employee to projects. Security record is used by the system to authorize the employee when he or she tries to access the system. Each security record has to be associated with the corresponding personal profile. The process of personal profile creation is described in "Resources" section of this chapter.

It is possible to assign roles directly to a security record. For example, John Doe is a project manager. As long as any project manager is also employee, two roles have to be assigned to the John Doe's security record: Project Manager and Employee.

But more effective way to assign roles to users is proposed by the concept of user groups. Several security records can be combined into a user group. Roles are assigned not to each security record, but to the user group. In this case it is not necessary to assign roles to each new user; you only need to put the security record of the newly created user into the corresponding user group.

The process of creation of user groups and roles assignment is described in "Users" section below.

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The security concept is described in more detail in the “Security” section of the “Main concepts” chapter of the GET Caesar User Manual.

#### 4.8.4.1 ROLES

All **roles** defined in the GET Caesar system are stored in the “GET Caesar” folder inside the “Roles” library inside the “Security” library.

Each role has only two attributes:

- Name of the role, for example “Project Manager” or “Employee”.
- Textual description of the role.
- Role code is a system name of the role that should not contain spaces.

Object permissions are assigned to roles. Roles are assigned to user groups, or to security records.

#### 4.8.4.2 USERS

Security records of all GET Caesar users are stored in the “GET Caesar” folder of the “Users” library. These security records are divided into several user groups (folders).

Let’s consider a process of configuring user groups and security records.

In the GET Caesar there are five predefined **user groups**:

1. Project Coordinators;
2. Project Managers;
3. Unit Managers;
4. Employees;
5. GET Caesar Administrators.

Each user group is a folder inside the “Users” library. All user groups of the GET Caesar system are stored in the “GET Caesar” folder of the “Users” library.

In order to change setting of a user group, just click on the folder icon of the corresponding folder. On the contents window you see attributes of the user group.

- “**Title**” is the name of the user group.
- “**Description**” is a textual description of the user group.
- “**Roles**” is a set of roles that are assigned to this user group. The roles are chosen from the list of all roles, you can change this list using the icons on the right side of the “Roles” box. If a

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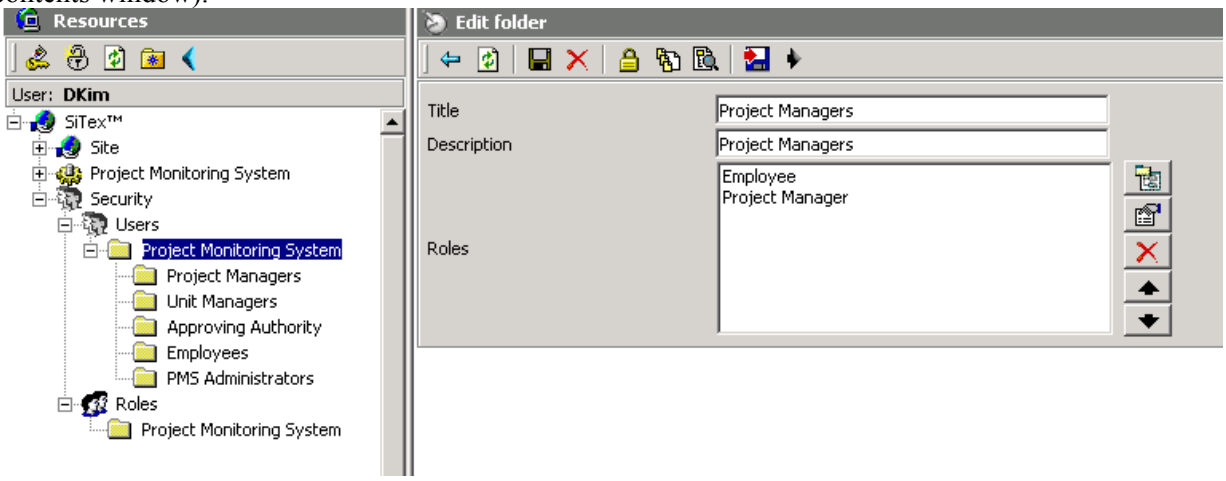
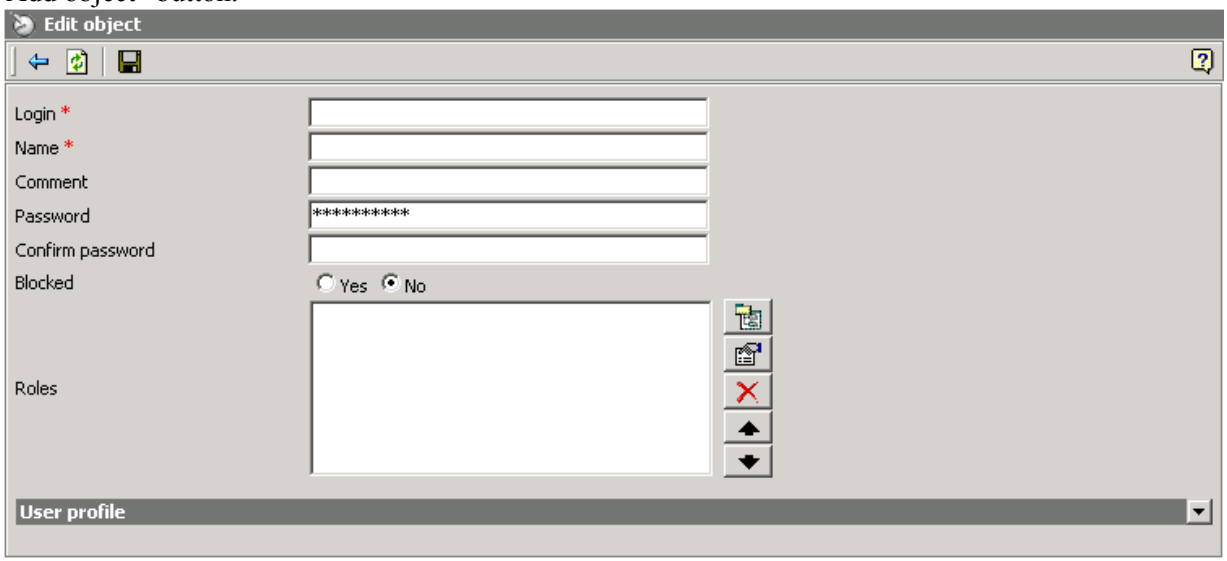
security record of a user is put to this user group, this user will be automatically assigned roles that are assigned to this group.

You can also create a new user group by creating a new folder (click on “Create folder” button in the contents window).




In order to create a security record, go into one of the user groups by clicking on the name of the corresponding user group. In the contents window you see the contents of this user group. Click on the “Add object” button.




Each security record has the following attributes:

- “**Login**” is the login name of the user
- “**Name**” is the full name of the user
- “**Comment**” is the textual comment on this user

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- "**Password**" is the user's password
- "**Confirm**" password is a field for password confirmation to avoid password mistakes.
- "**Blocked**" flag allows blocking of this user account (users that are blocked can not access the system).
- "**Roles**" field allows assigning roles to the security record. Each security record in some user group is by default assigned all roles that are assigned to the user group. It means that if you assign roles directly to the security record, they will be assigned in addition to the user group roles.
- The "**User profile**" section of this screen is currently not used in the GET Caesar, so you can leave it as it is.

It is recommended that roles assignment were done via user groups, not single security records. The reason for this is that concept of user groups decreases the amount of work needed to create a new user and makes the roles management more transparent.

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# APPENDICES

## A. GLOSSARY

This section provides definitions of terms, abbreviations and acronyms used in this document.

| | |
|---|---|
| **Absence period** | A period of time when employee can not participate in projects for some reason. The possible reasons of absence are defined in the administration console |
| **Approving person** | Refers to the member of the organization who is enabled to approve an order /release the project. |
| **Cost type** | Attribute of each order to classify the budget items which are not related to <internal resources> or <external resources>. The cost for these two resource types is determined automatically after resource assignment. The definition of cost types is located in a **<system directory>** |
| **Employee (e)** | Member of the organization delivering services to the projects |
| **Employee profile, or personal profile** | System repository that is maintained by each member of organization to describe the skills and certificates of each person. |
| **Occupancy, or occupancy value** | Percentage of working time (planned and effective) a member of the organization is dedicated to a certain project / project phase. Based on the definition of standard working hours (located in a **<system directory>)** the system computes this value after requesting skills, assigning persons or entering timesheets. |
| **Occupancy period of employee in project** | A period of time during which **<employee>** participate in a **<project>**. Occupancy period is defined by start and finish date |
| **Order** | Storage for all **planned** activity like resources, budgets and phases that is linked to a contractual agreement between delivering organization and client. After termination of the plan phase the order has to be approved by an appropriate authority in the organization. After approval the order transforms to a **<project>**, the entity to track all information for the current running project activities. |
| **Order budget** | Amount of money that is planned for a **<project>**. Order budget includes several types of costs: <internal resources> costs, <external resources> costs and other costs. Other costs are defined in **<system directory>** |
| **Order closure** | Order closure is a process during which a status of order changes from "CURRENT" to "CLOSED". Usually participants of this process are project manager and project coordinator |
| **Order type** | Attribute of each order to classify the order/project contents and which determines |

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| | |
|---|---|
| | the set of phases of the order/project. The definition of order types is located in a **<directory>.** |
| **Position** | A characteristic of an employee status in the company. Cost of an employee in project depends on the employee's position. The list of positions is defined in **<system directory>** |
| **Position request** | A set of requirements for an employee that has to participate in a project. During the process of **<resources assignment>** project manager forms a set of position requests that is called **<resources request>**. A position request includes such requirements as positions name, skills, occupation period, efforts, etc. |
| **Project** | At initiation the project inherits all planned data from the corresponding **<order>** and keeps track of resources, budgets and phases of the **running** project. By comparison of planned data with actual data the system supports means for automatic controlling actions (e.g. notifications to authorities). |
| **Project manager (pm)** | Member of the organization responsible for deployment of the project deliverables on time and in budget to the clients´ expectations. To reach this aim he is empowered with temporary resources (e.g. project team) and budget. |
| **Project tracking** | A process during which project manager tracks the resources, costs, deadlines and status of a project. Project tracking process should be implemented periodically after the project is start and until the project is finished. |
| **Projects coordinator (pc)** | Member of the organization responsible for managing inter-project dependencies (resources, budgets, etc). He is also the person required to release a project by approving of the order. |
| **Resources assignment** | A process during which resources for projects requested and assigned. Usually resources are requested by project manager and assigned by unit manager |
| **Resources request** | A list of **<positions requests>.** This list includes requirements for all employees that should participate in project. Resources request is sent by project manager to unit managers during the process of **<resources assignment>** |
| **Security record** | Storage of security identification of a user of the system. When a user tries to access the system, he or she is authorized based on security record. Security record has such attributes as login name, password, security roles, etc. |
| **System administrator, or technical administrator (ta)** | Member of the organization delivering services for the technical support of the system. |
| **System directory, or** | Reference data that has to be maintained by the **<technical administrator>** to customize the application according to the customer's business process. |

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**directory**

| | |
|---|---|
| **Timesheet** | System repository that is maintained by each member of organization to track work dedicated to a certain project/phase as well as absence. After submission the timesheets are forwarded to the unit manager for approval. |
| **Unit manager (um)** | Member of the organization responsible for leadership of a group of employees |
| **User group** | A named set of security records. Each user group is identified by name and set of roles. Set of roles for the user group is automatically assigned to all security records that belong to this user group. |
| **Work tracking, or timesheets infill** | A process during which an employee fills in his or her working hours spent on a particular project. This process must be performed by each employee on a regular basis. Based on work tracking data resources costs and resources usage are calculated |

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